

**Course Management Plan Date: 1 May 2011****Course Number:** Phase 1 (OCS), Phase 2 (OCS) and Phase 3 (OCS)**Name:** Army National Guard Officer Candidate School**US Army Infantry School****TASS ARNG OCS CMP****Fort Benning, GA****01 May 2011****THE ARMY SCHOOL SYSTEM Army National Guard Officer Candidate School**

**Summary.** This document provides a guide for The Army School System (TASS) Army National Guard (ARNG) Officer Candidate School (OCS) commanders and cadre.

**Proponent and exception authority.** The proponent of this pamphlet is the Commanding General, US Army Infantry School (USAIS). The commanding general, USAIS has the authority to approve exceptions to this pamphlet that are consistent with controlling laws and regulations. The commanding general, USAIS may delegate this authority, in writing, to a division chief within the proponent agency in the grade of colonel, or the civilian equivalent.

**Intent.** The intent of this pamphlet is to ensure that reserve component OCS candidates nationwide share one common standard, which mirrors the federal OCS program. It facilitates the cross-state and cross-TASS boundary training of US Army officer candidates (OCs).

**Use of the term ‘States’.** Unless otherwise stated, whenever the term ‘states’ is used, it is referring to the continental United States, Alaska, Hawaii, US Virgin Islands, Territory of Guam, Commonwealth of Puerto Rico, and District of Columbia.

**Supplementation.** Local OCS programs may supplement this document in order to meet the needs of local standard operating procedures (SOPs) and regulations, but they may not substantially modify any policy set forth in this document without written authorization from the proponent.

**Suggested improvements.** Users are invited to send comments and suggested improvements on DA Form 2028 (Recommended Changes to Publications and Blank Forms) directly to the OCS Subject Matter Expert, 200<sup>th</sup> Regiment, Fort McClellan, Alabama 36205.

**Distribution.** This publication is available in electronic media only and is intended for all Reserve component OCS commanders and cadre.

**Supersession.** This ARNG OCS course management plan (CMP) supersedes ARNG OCS CMP dated 01 Feb 2011.

As the Army and our nation continue to evolve and change, The Army School System, Army National Guard OCS program must also change to meet the challenges of the current force structure. Since publishing the ARNG OCS CMP in October 2006, several opportunities were recognized for improvement and standardization on the national scale. The Army National Guard, United States Army Infantry School, The Army School System and the subject matter experts (SME) strive to provide every Soldier involved in the ARNG OCS program with clear guidance for the execution of OCS training. The course management plan and the program of instruction (POI) is a continuing effort to provide clear standards and clear guidance of ARNG OCS training.

The SME will have a major role in the operation of OCS. The ARNG TASS SME structure will be located at the designated ARNG School, as approved by the Director, Army National Guard, in the TASS transformation plan. The SME will function under the guidance of the National Guard Bureau Operations, Readiness and Training Directorate (ARNG-TRI) with coordinating authority across state consolidated area boundaries for the purpose of coordinating the flow of critical information between proponent schools and ARNG TASS schools, assist ARNG-TRI in the training coordination conference process and assist NGB with the staffing of TASS related issues within their respective training lanes.

Training a second lieutenant consists of two phases of the Basic Officer Leadership Course (BOLC): BOLC A is the pre-commissioning education for OCS, Reserve Officer Training Corp or United States Military Academy students; BOLC B is the leadership and branch training section for those who are already officers. In leadership training, Soldiers train primarily in a field environment, undergoing a series of drills based on real-life scenarios and focusing on small-unit leadership and tactics. Officer Candidate School develops and evaluates leadership in Soldiers striving for a commission in the United States Army, the Army Reserve and the Army National Guard. It also teaches and tests select academic subjects that candidates demonstrate task mastery and skill application throughout the progression of the course.

The OCS environment demands physical and mental stamina of officer candidates and cadre. Officer Candidate School cadre must possess leadership skills enabling them to teach, assess and counsel OCs to become proficient in the art and science of leadership, and warrior tasks and battle drills (WTBDs). The OCS cadre and OCs train in a demanding, high-stress, twenty-four hour environment. This environment is a critical factor in developing leadership skills among the officer candidates.

Officer Candidate School cadre receive specialized training and orientation to the OCS environment during the Platoon Trainer Qualification Course (PTQC). This course provides detailed instruction on the establishment and maintenance of the OCS environment. Most Soldiers can lead others and accomplish tasks with little effort when unfettered with time constraints and stress. However, when stress, time constraints and multiple tasks are added, candidates must rely on teamwork, prioritization, delegation, and leadership skills to bring their squad or platoon to mission accomplishment. The Soldiers who succeed in this environment are the ones who become second lieutenants in the Army National Guard.

This CMP and POI are designed to complement and enhance the OCS environment while providing the requisite pre-commissioning training. Structured OC and platoon trainer time provides opportunities to evaluate and develop leadership skills by using field leadership exercises (FLXs) and tactical training as vehicles to provide opportunities to evaluate the OCs demonstrated leadership abilities in a stressful environment. Tactical field missions require candidates to quickly analyze a situation and develop, communicate, and implement a plan using sound leadership principles. Candidates are not expected to become tacticians and are not evaluated against this standard. They are expected to be leaders and are evaluated on their ability to lead Soldiers to mission accomplishment in the OCS environment.

The cardinal rule in OCS is to teach first and then test. All officer candidates must fully understand the mission, the standards, and all other expectations if they are to complete a task to standard. All information must be provided up front, the standards communicated clearly, and the criteria explained for mission success. Officer Candidate School cadre must not set OCs up for failure by hiding requirements, communicating unclear standards, or withholding information. If officer candidates fail, it usually means they did not use time, resources and personnel properly, and not because the task was impossible. Cadre must ensure that training is challenging and continues to support the OCs success. Training must always have a valid teaching point that never jeopardizes the health, well being, or safety of the OC.

Officer Candidate School develops branch immaterial officers, prepared to pursue their initial branch proficiency training. BOLC B (the officer basic course) completes the initial education process of a second lieutenant. Commanders must encourage officer candidates to maintain the pursuit of excellence instilled in OCS. This drive and motivation sustains good officers throughout their careers.

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**Chapter 1. GENERAL****1-1. General**

a. **Purpose:** The primary purpose of this CMP is to identify course requirements and specify responsibility for each requirement. This CMP contains detailed information pertaining to the conduct, execution and administration of Army National Guard Officer Candidate School training. All personnel involved in the management of the ARNG OCS course are the primary users of this CMP.

b. **Scope:** The ARNG OCS CMP is a standing order that applies to all ARNG OCS training programs. It does not supersede established regulatory guidance, nor is it applicable to functions or procedures outside of OCS training. It is applicable to the ARNG OCS SME, every Battalion and Company in TASS, and is applicable to all phases of OCS training. This CMP supersedes all previous versions ARNG OCS CMP dated 01 Feb 2011.

c. **CMP Layout:** See Table of contents.

d. **Terms:** Annex A includes a list of terms and definitions as they apply to the ARNG OCS program.

e. **End of Course Summary:** In accordance with (IAW) AR 623-3, Paragraph 3-52 b (4) and (9) and TR 350-18, paragraph 3-27, Department of the Army (DA) Form 1059, Service School Academic Evaluation Report, is not authorized for Soldiers attending and participating in the ARNG OCS program. An End of Course Summary is prepared for candidates enrolled in OCS on day one of Phase 1. This report serves as a record of training completed, leadership evaluation scores, and scores on end-of-module exams. It is maintained throughout the conduct of OCS training and completed when the candidate officially graduates from OCS or when a candidate is officially disenrolled. This form has the same precedence as a DA Form 1059

## **Chapter 2. COURSE MANAGEMENT RESPONSIBILITIES**

**2-1. Course Management Responsibilities.** The successful management of the ARNG OCS program depends on the coordination of many elements. A list of course management tasks and responsibilities is below.

**2-2. United States Army Infantry School Fort Benning, Georgia.** USAIS is the proponent for ARNG OCS training and has responsibility for the following tasks:

- a. Establish and maintain a working relationship with the OCS SME, 200<sup>th</sup> Regiment, Fort McClellan, Alabama 36205.
- b. Update Platoon Trainer Qualification Course, Platoon Trainer Guide, CMP, POI's, OC Guides, training support packages (TSPs) and OCS examinations as necessary.
- c. Coordinate changes and corrections to OCS courseware and publish revisions as necessary.
- d. Establish requirements for OCS instructor certification (see Chapter 3, Paragraph 3-3).
- e. Establish requirements for the platoon trainer certification (see Chapter 3, Paragraph 3-2).
- f. Act as the accreditation authority for all ARNG OCS programs. The USAIS, Directorate of Training, coordinates and conducts accreditation evaluations of the OCS TASS Battalions and individual companies according to US Army Training and Doctrine (TRADOC) Regulation 350-70, and conducts accreditation visits periodically to ensure OCS training complies with all USAIS, TRADOC, and Army regulatory guidance. These visits are conducted during all phases of training and are conducted IAW the TRADOC Army Enterprise Accreditation Standards Guide.

**2-3. OCS Subject Matter Expert.** The ARNG OCS TASS SME structure is located at 200<sup>th</sup> Regiment Regional Training Institute (RTI)-AL as approved by the Director, Army National Guard in the TASS Transformation Plan. The SME will function under the guidance of the ARNG-TRI with coordinating authority across State and consolidated area boundaries for the purpose of coordinating the flow of critical information between proponent schools, assist ARNG-TRI in the Training Coordination Conference Workshop process, and assist NGB with the staffing of TASS related issues within their respective training lanes. SME's will conduct staff assistance visits on battalions prior to accreditation by the proponent.

**2-4. OCS TASS Battalions.** The OCS TASS battalion is the link between the SME and the OCS companies in each state. The OCS TASS battalion is ultimately responsible for ensuring the companies follow and implement OCS training IAW this CMP and all other regulatory guidance. The OCS TASS battalion that conducts consolidated or accelerated Phase I has coordinating authority over OCS companies within their area. OCS TASS battalion commanders are responsible for the following tasks:

- a. Ensure all OCS training in the battalion is realistic, safe, challenging and in compliance with the CMP and TRADOC approved POI.
- b. Direct and empower OCS company commanders to create and maintain the OCS environment as outlined in the OCS Platoon Trainer Guide.
- c. IAW Army Quality Assurance Program Guidance December 2010. Conduct assessment on all subordinate training organizations. Assessments are identified as the key evaluation for achieving accreditation status every three years. Reporting format is completed IAW established TRADOC Accreditation Standards. Commanders can accomplish assessments whenever deemed necessary; however it must be conducted at a minimum every three years; no earlier than six months prior to accreditation and submitted through the chain of command no later than 60 days prior to accreditation visit.

d. Implement a memorandum of agreement or policy guidance document with each state Regional RTI commander's approval regarding the planning, conduct, and assessment of OCS training. At a minimum this document must include:

(1) A yearly training calendar (YTC) establishing the active duty training (ADT) periods for Phase I, Phase II and Phase III training.

(2) An outline of the training sequences for each phase. This outline identifies specific training modules taught during each of the OCS phases.

(3) A suspense calendar for subordinate units to submit yearly training plans (YTP), training schedules, and requests for instructor support or training.

(4) Staff assistance visit dates for the training year.

e. Coordinate the conduct of Phase I ADT at a consolidated location within the consolidated areas.

(1) Assist with training site selection to ensure best possible site is chosen. Coordination is based on input from the various state and/or territory RTI Commanders.

(2) Establish dates for the ADT periods based on the availability of the hosting state's support requirements and the subordinate units' training plans.

(3) Coordinate instructor support, classrooms, support for field training sites, training aids, test control procedures, student company organization, and cadre support. Identify shortfalls and request resolution with supporting states in the battalion and through support outside the battalion.

(4) Publish Phase I ADT training schedule.

(5) Coordinate transportation requirements at the ADT training site. Coordinate arrival and departure times. Assist in transportation planning as required. Identify shortfalls and request support from states chain of command.

(6) Certify qualified instructors and platoon trainers IAW Chapter 3, Paragraph 3-2 and 3-3 of this CMP.

(7) Implement and maintain battalion internal instructor evaluation program IAW Chapter 3, Paragraph 3-4 of this CMP.

f. Coordinate the planning, conduct, and assessment of the Phase III ADT period with the host site and subordinate units. Participate in the planning conference to identify each state's responsibilities in support of this training period.

(1) Publish and distribute Phase III training guidance to subordinate units in a timely manner. Validate unit understanding of the information and assist in the early resolution of potential conflicts with all OCS companies. Establish the guidance necessary to ensure all OCS companies have sufficient time to plan for and execute tasks in support of the Phase III ADT period.

(2) Brief OCS Company cadre on their responsibilities during the conduct of Phase III training. Ensure each cadre member understands his/her mission and has completed adequate training and preparation to ensure mission accomplishment.

g. Review and approve yearly training plans/yearly training calendars from subordinate OCS companies. Ensure the plans cover all required training IAW this CMP. Review the inactive duty training (IDT) training schedules and ensure adequate counseling time is included IAW this CMP. Crosscheck the training schedules with the yearly training plan to ensure they are complimentary.

h. Provide assistance to OCS companies in planning the training. Identify shortfalls and assist the OCS companies in finding resolutions, and work in developing lines of support with the RTI commander for administrative, logistical, and operational requirements.

i. In cases where a resolution cannot be achieved and training is not in compliance with this OCS CMP or OCS courseware, companies and battalions are to submit a memorandum requesting waivers/exception to policies. The OCS TASS battalion commander will review the waiver/exception to policy requests submitted from companies, attach a battalion endorsement, and forward the request for waiver/exception to policy to the SME for processing as required.

(1) Proponent waivers such as instructor, platoon trainer, Army Training Requirements and Resource System (ATRRS) course minimum, courseware, facilities and POI, must be submitted via e-mail and initiated by the OCS company commander thru the OCS battalion commander to the OCS SME. The request for waiver/exception to policy must occur in a timely manner and needs to be forwarded to the SME twenty-one days prior to the start of the course. The SME must forward it to Fort Benning, USAIS, no later than fourteen days prior to the start of the course. Approval or disapproval can only be granted by USAIS. The OCS company commander must project possible training conflicts early in the planning stage. In addition, the OCS TASS battalion, in its review of the training plans and schedules, must make early identification of possible problem areas and make every attempt to reach a plausible resolution prior to initiating a request for waiver.

(2) Proponent waivers must meet the following requirements:

- a.) The waiver must be in memorandum format.
- b.) Waiver Request (subject of request) is in the subject line of the e-mail.
- c.) Course name, class name, and date to be conducted.
- d.) Period of instruction requiring waiver.
- e.) What is being requested.
- f.) Reason waiver is required.
- g.) Actions taken to attempt to rectify the issues.
- h.) Point of contact information for the waiver request.

(3) Responses from USAIS go directly thru the SME to the OCS TASS battalion who forwards copies to the company commander.

(4) ARNG-TRI Waivers/Exception to Policy for education, non-completion of AIT and time in service must be submitted via e-mail and initiated by the OCS company commander thru the battalion and SME to ARNG-TRI. The SME will forward to ARNG-TRI for approval. Approval or disapproval can only be granted by ARNG-TRI. All waivers/exception to policy must be approved prior to the course start date.

(5) ARNG-HRH-P Waivers/Exception to Policy for moral and civil convictions must be submitted via e-mail and initiated by the OCS company commander thru the state TAG to the Personnel Policy Branch and Readiness Division at



ARNG-HRH-P. Approval or disapproval can only be granted by ARNG-HRH-P. NGB waivers must be approved prior to the course start date.

j. Provide training opportunities for instructors and platoon trainers to receive certification established in Chapter 3, Paragraph 3-2 and 3-3 of this CMP. Validate proponent certification semi- annually in accordance with Chapter 3, Paragraph 3-4 of this CMP. Provide for the conduct of the PTQC as required to ensure all OCS cadre obtain qualification and certification.

k. Distribute OCS courseware as required by USAIS to subordinate units and ensure the courseware is approved by TRADOC and USAIS.

l. Make recommendations to the SME for the improvement of OCS courseware. Comments and suggestions for improvements should be submitted using DA Form 2028.

m. Provide yearly training guidance to the OCS companies IAW FM 7-0, *Training For Full Spectrum Operations*. For states conducting Phase II training in a separate unit training assembly, IDT status, the yearly training guidance must include recommended training sequence or yearly training calendar that recommends Phase II training sequence by month.

n. Maintain copies of all platoon trainer and instructor certification documentation. These file copies do not relinquish the responsibility of the state OCS company and individual platoon trainers and instructors to maintain file copies and personal copies.

**2-5. State OCS Company.** The state OCS company is the element in each state or territory responsible for the planning and conduct of all OCS Phase II IDT training. State OCS company commanders must:

a. Develop YTP/YTC and IDT training schedules that reflect the regulatory guidance contained in this CMP and OCS courseware. The training time specified in this courseware is the minimum time that is reflected in the commanders YTP/YTC and training schedules. No other training events are scheduled concurrently with the required training and commanders are allowed the flexibility to teach to standard, rather than to time. All required training times listed in this CMP and on the TSPs must be accounted for on each training schedule. The OCs understanding of the course material controls the actual time required to complete training. The requirement to produce a YTP/YTC does not apply to companies in OCS battalions that produce the YTC at battalion level and dictate a mandatory Phase II training sequence to facilitate SUTA training. Training schedules must be produced by these OCS companies and submitted to the OCS battalion for approval.

b. Submit YTP/YTC and training schedules to the OCS TASS battalion for review and comment. The OCS TASS battalion ensures these documents reflect the requirements of this OCS CMP and courseware. In those instances where a conflict arises, the battalion assists the company in reaching a resolution and correcting their training plan.

c. Coordinate administrative, logistical, and operational training support requirements. Resolve OCS CMP and courseware conflicts with the OCS TASS battalion.

d. Request OCS courseware through the OCS TASS battalion commander. Courseware is distributed in accordance with TRADOC policy. ATRRS programming establishes the school code for the RTI. All requests for courseware must reflect this school code.

(1) TRADOC mandates the distribution of publications through the internet. As more courseware becomes digitized, the RTI must download it as it becomes available. The RTI must publish enough copies to support the instructor-to-student ratio established by this CMP and the OCS TSPs. The state OCS company commander must ensure this process occurs in a timely manner and does not interrupt the conduct of OCS training.

(2) In some instances, USAIS publishes and distributes OCS courseware electronically to the OCS SME; who distributes it to the battalions. The battalions will distribute it to the companies. The SME will put all OCS courseware onto the OCS SME website for all authorized personnel to view and download. The battalions and companies must incur the cost and time to publish sufficient quantities for cadre, instructors, and students. Publications provided by ATSC will be forecasted and requisitioned on a timely basis IAW ATSC policies/procedures.

(3) Commanders include the cost of publishing OCS courseware in the budget. Throughout the progress of the course, publication of essential support documents becomes necessary and includes OC guides, Platoon Trainer Guides, CMP, POIs, instructor TSPs, leadership assessment forms, peer evaluation forms, end of course summaries, student handouts, and more.

e. Plan, conduct, and assess company OCS training. Establish and maintain the OCS environment in accordance with the OCS Platoon Trainer Guide and provide command and control, administrative support, and command supervision of established policies and standards pertaining to the performance, care, conduct, appearance, and safety of all officer candidates enrolled in OCS. Ensure only qualified and certified platoon trainers/instructors conduct training in accordance with approved courseware and regulatory guidance contained in the CMP and POI.

f. Supervise the conduct of leadership evaluations IAW the OCS Platoon Trainer Guide and this CMP.

g. Establish and maintain a candidate record IAW Chapter 4, Paragraph 4-2 of this CMP for each student enrolled in OCS prior to their attendance at Phase I. Ensure that candidates provide all documentation required for enrollment into Phase I of OCS IAW NGR (AR) 600-100 and any additional published guidance by NGB prior to arrival at Phase I training.

h. Prior to candidates attending Phase III consolidated training, the OCS company commander must consider whether each candidate possess the potential to acquire the leadership skills, attitudes, and knowledge needed to become a successful second lieutenant.

(1) Candidates considered not possessing the potential to acquire the leadership skills, attitudes and knowledge needed to become a successful second lieutenant by the OCS company commander are counseled in writing and recycled or relieved from the OCS program. Dismissal/relief of a candidate must be accomplished IAW Chapter 5 of this CMP.

(2) Candidates considered by the OCS company commander to possess the potential to acquire the leadership skills, attitudes and knowledge needed to become a successful second lieutenant graduate the Phase II training and proceed to Phase III.

i. Recommend commissioning of candidates who successfully meet all phase and graduation requirements outlined in Chapter 12 of this CMP and as prescribed in regulatory guidance to the state chain of command.

j. Select and prescribe appropriate remediation (retraining/retesting/recycle/relief) for candidates who fail to meet the standard and/or do not pass an end-of-module examination or a pass/fail training event.

k. Recommend recycle or relief of candidates who fail to meet physical and/or academic requirements and/or leadership standards prescribed by this CMP and the OCS Platoon Trainer Guide.

l. Ensure only qualified and certified platoon trainers and instructors conduct training and perform the duties and responsibilities of the platoon trainer/instructor staff. Ensure all cadre meet all requirements established in Chapter 3, Paragraph 3-2 and 3-3 of this CMP. Coordinate with OCS TASS battalion for proponent certification. Non-certified personnel are not permitted to conduct training for the OCs at anytime.

m. Maintain training records/documents at the actual training location. Candidate administrative records, training records and platoon trainer and instructor certification files must accompany the company wherever training is taking place. Companies are responsible for screening all files IAW the requirements listed in this CMP.

n. Maintain all other historical documents at the RTI/OCS company location unless directed otherwise by the OCS TASS battalion commander.

o. Conduct risk assessments for all training according to AR 385-10, *Army Safety Program*, and FM 5-19, *Composite Risk Management using DA Form 7566*. Follow local environmental regulations and assess environmental impact of training prior to execution. Adhere to the cautionary information outlined in the applicable training support package (TSP).

**2-6. Platoon Trainer/NCOs.** The central focus of OCS training is on platoon trainer/candidate interaction. During the conduct of OCS training, it is the platoon trainer that teaches the science and art of leadership to the officer candidate. The OCS program is centered on the Army's leadership doctrine found in FM 6-22, *Army Leadership*, and it is the platoon trainer that imparts this knowledge on the candidate. It is paramount that all platoon trainer and NCOs follow these guidelines:

a. Be proficient in all material being conveyed to the officer candidates. This includes formal and informal instruction. Platoon trainers must also be aware of the hidden curriculum, which is taught to officer candidates through every word, action, and deed. Platoon trainers must perform their duties as Soldiers of high standards 100% of the time, and present an example for candidates to emulate.

b. Instruct candidates on the art and science of leadership embodied in FM 6-22, *Army Leadership*. Convey to candidates the Be, Know and Do philosophy of leadership and what each piece means to quality officers. Be responsive to questions and provide answers by directing to the proper references. Ensure success by showing candidates how to properly lead our Soldiers.

c. Create and maintain a stressful and demanding OCS environment as outlined in the Platoon Trainer Guide. Be intimately familiar with the provisions and the progression of the environment in order to extract the maximum training benefit for the officer candidate.

d. Evaluate candidate leadership performance through the Leadership Assessment Program (LAP) outlined in the Platoon Trainer Guide. Use this program and counseling to identify and develop positive leadership traits and skills in the officer candidates.

e. Identify officer candidates who are unsuccessful in leadership roles and are unable to improve their leadership skills to the OCS company commander for possible recycle or relief from OCS. Counsel and document candidates at risk for past performance and potential recycle or relief from OCS on DA Form 4856.

f. Brief the required safety and environmental impact considerations to the officer candidates daily and anytime conditions change. Take immediate corrective action to ensure candidate and cadre safety when necessary, and report all unsafe conditions to the chain of command.

g. Provide guidance and counseling to candidates regarding leadership and academic performance. Approve the candidate's plan of action to improve his/her leadership skills and indicate follow-up action required to ensure corrections are made.

h. Counsel candidates and document on a DA Form 4856 if they fail to achieve a 70% passing grade on any exams. Document the consequences if the candidate fails to meet the standard during retest and inform the OCS company commander of the candidate's failure to meet the required passing score. Must coordinate with instructor staff to ensure

this academic counseling is conducted, but is not conducted by both the platoon trainers and instructors (**either party can conduct academic counseling**).

i. **Corrective Training.** IAW TR 350-6 para 2-5 a. (3). Corrective training and corrective action are tools available to leaders to rectify minor deficiencies, simple infractions, and less serious breaches of discipline, to focus the attention of Soldiers and to inspire compliance with Army standards. At no time is corrective action meant to demean, belittle, or embarrass a Soldier. The effective leader knows when to use permissible corrective training and NOT excessive or unauthorized physical activity to coach, teach, train, and mentor Soldiers who are not meeting the standard. Physical exercise is an authorized corrective action. Requiring Soldiers to perform a reasonable number of repetitions of authorized physical exercises IAW FM 21-20/TC 3-22.20 as a motivational tool is permitted for corrective action. However, consideration must be given to the exercises, repetitions, and total number of times each day that exercise is used for corrective action to limit the potential for over training and injuries.

j. **Hazing.** IAW AR 600-20 para 4-20 and TR 350-6 para 2-6, any form of hazing is PROHIBITED. Hazing is defined as any conduct whereby one military member or employee, regardless of Service or rank, unnecessarily causes another military member or employee, regardless of Service or rank, to suffer or be exposed to an activity that is cruel, abusive, oppressive, or harmful. Hazing is not limited to superior-subordinate relationships, it may occur between peers.

**2-7. Instructors.** Instructors manage the day-to-day learning activities of OCs. Instructors are critical to officer candidate success and graduation from the course, and it is paramount that all assigned, attached, and guest instructors follow these guidelines:

a. Be technically and tactically proficient in all formal instruction presented to OCs. Instructors must ensure they are thoroughly familiar with the information presented.

b. Conduct all classes to Army Basic Instructor Course (ABIC) standards and IAW instructor evaluation sheet contained in Annex F of this CMP.

c. Be aware of the hidden curriculum taught to officer candidates through every word, action, and deed. Instructors must perform duties as Soldiers to a high standard and present themselves as an example for candidates to emulate.

d. Be responsive to candidate questions and direct candidates to the proper resource for answers. Instructors are not obligated to provide answers but must assist officer candidates in determining the answer.

e. Maintain classrooms and training facilities in a manner that aids learning. Ensure all necessary course materials and references are on hand, and the facilities are neat, clean, safe, and support the training conducted.

f. Be familiar with the OCS environment created and maintained by the platoon trainer staff, and support the requirements of the OCS environment.

g. Brief the required safety and environmental impact considerations for every block of instruction conducted. Take immediate corrective action to ensure candidate and cadre safety when necessary, and report all unsafe conditions to the chain of command.

h. Provide candidates with assistance related to access to publications, equipment, forms and instructional material.

i. Evaluate candidate performance on all practical exercises and end-of-module exams. Follow test control measures IAW regulatory guidance.

j. Counsel candidates and document on a DA Form 4856 if they fail to achieve a 70% passing grade on any exams. Document the consequences if the candidate fails to meet the standard during retest and inform the OCS company commander of the candidate's failure to meet the required passing score. Must coordinate with instructor staff to ensure

this academic counseling is conducted, but is not conducted by both the platoon trainers and instructors (**either party can conduct academic counseling**).

k. Evaluate course materials and training methodologies. Provide courseware product modifications and improvements to the OCS chain of command for consideration by the OCS proponent, USAIS. Prepare suggestions/recommendations for improvements on a DA Form 2028.

**2-8. Officer Candidates.** Officer candidates are the central focus of OCS. All effort expended by the OCS cadre and staff is to ensure officer candidate leadership skill development and education. All OCS cadre and staff must remain focused on the OCs and the successful completion of their training. However, as with any training, the ultimate success of the officer candidate lies with the officer candidate. Officer candidates must adhere to the following guidelines and all regulatory guidance pertaining to OCS. Candidates will receive a Student Evaluation Plan (SEP) during the initial counseling covering all the guidelines IAW TR PAM 350-70-5 (See Annex G).

a. Must meet all course prerequisites and provide required documentation of the course prerequisites prior to enrollment in Phase I of OCS. See NGR 600-100, Commissioned Officers Federal Recognition and Related Personnel Actions, and any additional published guidance by NGB prior to arrival at Phase I training. USAR prerequisites are governed by the provision of AR 140-50.

b. Meet all physical, academic, and leadership performance requirements listed in this CMP. The individual must meet the requirements of each phase of training before moving on to the subsequent phase of training.

c. Maintain appropriate height/weight standards IAW AR 600-9 throughout all phases of OCS. Verification of height and weight is determined on day 1 of Phase I with a mandatory weigh in for all officer candidates. Candidates not IAW AR 600-9 on day 1 of training are not allowed to begin Phase I training and are returned to their home state. While enrolled in OCS, candidates must maintain documented evidence showing height/weight on DA Form 705 and if necessary (exceeding table weight and requiring tape) DA Form 5500-R (male) or DA Form 5501-R (female). Traditional Phase II officer candidates not IAW AR 600-9 are placed on the weight control program and continue to train in their current phase of OCS. Officer candidates are not allowed to graduate their current phase and move on to the next phase of training until they meet appropriate height/weight standards IAW AR 600-9. Company commanders must monitor overweight candidates monthly and counsel them in writing IAW the weight control program.

d. Must complete a minimum of one garrison leadership position for Phase I and Phase II. It is recommended that commanders maximize the number of leadership positions per these two phases for each candidate providing the maximum opportunity for training and improvement. **Candidate must attain an 'E' or an 'S' to move on to Phase III.** Phase III will have a minimum of two field leadership evaluation reports (FLERs); one for the LRC (LRCR) and one for FLX II operations. **Candidate must attain an 'E' or an 'S' on their FLX II operations evaluation to graduate Phase III.**

e. Prior to attending Phase III consolidated training, the OCS company commander must consider each candidate to possess the potential to acquire the leadership skills, attitudes, and knowledge needed to become a successful second lieutenant. Candidates not considered by the OCS company commander to possess this potential are counseled in writing. Company commanders will recommend to their state BN commander whether an OC should be recycled or relieved from the OCS program.

f. For various reasons such as injury, performance, or other factors, OCs may be relieved from the current phase of training and be recycled. Candidates will have 27 months to complete all three phases of the OCS program. A candidate failing to complete all three phases within 27 months will need to reenroll for the entire program.

g. Graduates desiring federal recognition must meet all federal recognition requirements as outlined in NGR 600-100 for ARNG and AR 140-50 for USAR.

**Chapter 3. PLATOON TRAINER AND INSTRUCTOR CERTIFICATION**

**3-1 TASS Battalion Initial Proponent Certification Process:** Based upon delegation from the proponent, each TASS battalion commander will initiate an initial proponent certification process IAW sub paragraph (1) or (2) below for the purpose of certifying personnel before they can instruct within the OCS community. The TASS battalion commander or his/her designated representatives must be **Proponent Certified** in order to conduct the Initial Proponent Certification evaluations and must be equal in rank or senior to the person being certified. There are two methods of the initial proponent certification process that can be used in certifying Soldiers to instruct OCS.

**(1) Conducting an Initial Proponent Certification Evaluation during the Army Basic Instructor Course:** Students attending ABIC that will be assigned in an OCS instructor or platoon trainer position will be required to teach a 50 minute block of instruction using an OCS training support package lesson plan. The designated representatives will use the instructor performance checklist in Annex F to this CMP to evaluate the potential instructor/platoon trainer. The advantage of this method of certification allows the designated representatives to see how the potential instructor/platoon trainer interacts with the students attending ABIC prior to teaching officer candidates. This method of certification will ensure that potential instructors and platoon trainers are capable of conducting quality ABIC instruction.

**(2) Conducting an Initial Proponent Certification Board:** Potential OCS instructors and platoon trainers that have graduated and received a DA Form 1059 from the ABIC, the Total Army Instructor Training Course (TAITC), or the Battle Focused Instructor Training Course, and have never been certified to instruct in OCS will be required to teach a 50 minute block of instruction from an OCS TSP lesson plan to the proponent certification board prior to teaching OCs. The proponent certification board consists of the battalion commander's designated representatives. The designated representatives will use the instructor performance checklist in Annex F to this CMP to evaluate the potential instructor/platoon trainer. Decisions of the board are final. Board members capture the results of the proponent certification board in memorandum format detailing that the evaluated instructor is certified to be an OCS instructor/platoon trainer in the National Guard OCS program. Example of the certification memorandum format is found in Annex F to this CMP. Once certified, instructors/platoon trainers remain certified while assigned/attached/guest to the state OCS battalion/company as long as they satisfactory perform their duties under provisions of Chapter 3. Upon reassignment from the state OCS Company, instructors/platoon trainers remain certified for two years or as long as they satisfactory perform OCS duties under the provisions of Chapter 3, Paragraph 3-3.

**(3) The Initial Proponent Certification Board:** Validates that the instructor/platoon trainer meets instructor qualification/certification requirements. Reviews the evaluated instructor's folders to ensure documented evidence qualification/certification requirements are present and correctly documented IAW Chap 3, Para 3-2 and 3-3 of this CMP.

**(4) The Initial Proponent Certification Board Documents:** Either method of the proponent certification process will require the same documents to be placed in the instructors and platoon trainers' folder. Documents will include:

- (a) TASS Battalion Commander's Certification Memorandum.
- (b) Copy of the OCS TSP Lesson Plan.
- (c) The Instructor Performance Checklist.

**3-2. Platoon Trainer Qualification/Certification Requirements.** All assigned, attached and guest platoon trainers must meet qualification and certification requirements listed below: All certification documentation must be in the platoon trainer packet.

- (1) Be a graduate of ABIC, TAITC, or BFITC and have documented evidence of graduation with a DA Form 1059.
- (2) Platoon Trainers shall have no more than eighteen months, from their date of assignment, to complete the Tactical Certification Course (TCC) and have documented evidence of graduation from the course.
- (3) Possess instructor additional skill identifier of 8 (enlisted cadre/warrant officer cadre) or identifier 5K (commissioned officer cadre). The instructor must have orders awarding ASI. The individual is eligible for an instructor ASI at the completion of courses identified in 3-2 (1) above.
- (4) Annually pass a standard, three-event (no alternate events) Army physical fitness test (APFT). The individual must have a current DA Form 705 with a passing, for record, score. Furthermore, platoon trainers must meet all physical requirements demanded of the OCs enrolled in the class. Platoon trainers unable to meet the physical requirements required of the OCs due to permanent profile or other physical limitations are removed from the duties of a platoon trainer until they can meet the physical requirements required of the officer candidates.
- (5) Meet and maintain appropriate semi-annual height/weight standards IAW AR 600-9. Must have documented evidence showing height/weight on a current DA Form 705, and if necessary (exceeding table weight and requiring tape) DA Form 5500-R (male) or DA Form 5501-R (female). Platoon trainers not IAW AR 600-9 are removed from duties involving contact with OCs until meeting the standards of AR 600-9.
- (6) OFFICERS: Hold the rank of 1LT (O-2), WO2, or above. Documented evidence is promotion orders, PQR or certified 2-1 showing appropriate rank. It is preferable and highly recommended to assign CPTs with company command and platoon leader experience and 1LTs with platoon leader experience. Officers/Warrant Officers must be a graduate of BOLC B or Warrant Officer Basic Course.
- (7) NCOs: Hold the rank of SFC (E-7). SFCs must complete Advanced Leaders Course (ALC); or advanced noncommissioned officer course (ANCOC) or its equivalent. These are the experts in platoon and company operations needed to teach/mentor our officer candidates. A waiver can be requested based on prior platoon sergeant experience and submitted by companies and routed through battalions and the SME before going to Fort Benning (refer to paragraph 2-4 i). Documented evidence is a completed DA Form 1059 showing graduation from the appropriate course.
- (8) Complete proponent certification by submitting all certification/qualification documentation listed above to the OCS TASS battalion certification official, and conduct a 50 minute ABIC standard block of instruction. Must have all documented evidence and receive a 'go' on the instructor evaluation for certification. Documented evidence is a certification memorandum produced by the OCS TASS battalion documenting the findings of the certification official. The certification official will be TAITC/BFITC/ABIC qualified and of equal or greater rank designated by the TASS battalion commander. (See Annex F for sample memorandum.)
- (9) Be a graduate of the Platoon Trainer Qualification Course, TAC Qualification Course, or TAC Officer Training and Orientation Course. Documented evidence is a completed DA Form 1059 showing graduation from one of the 3 courses or a DA form 87.

**3-3. OCS Instructor Qualification/Certification Requirements.** All assigned, attached and guest OCS instructors must meet qualification and certification requirements listed below:

- (1) Be a graduate of ABIC, TAITC, or BFITC and have documented evidence of graduation with a DA Form 1059 showing graduation from the course.

(2) Instructors who teach squad or company level infantry tactics during Phases 2 or 3, shall have documented evidence of graduation from the Tactical Certification Course (TCC).

(3) Possess instructor additional skill identifier (ASI) of 8 (enlisted cadre, warrant officer cadre) or identifier 5K (commissioned officer cadre). The individual must have orders awarding ASI to the individual Soldier. The individual is eligible for an instructor ASI at the completion of ABIC, TAITC or BFITC.

(4) Annually pass the APFT. Must have current DA Form 705 with a passing, for record, score that is no more than 12 months old. Furthermore, OCS instructors must meet any physical requirements demanded of the officer candidates for the block of instruction being taught. Instructors not meeting this requirement will not teach that block of instruction.

(5) Meet and maintain appropriate semi-annual height/weight standards IAW AR 600-9. Must have documented evidence showing height/weight on a current DA Form 705 and if necessary (exceeding table weight and requiring tape) a DA Form 5500-R (male) or DA Form 5501-R (female). Instructors not IAW AR 600-9 are removed from duties involving contact with officer candidates until meeting the standards of AR 600-9.

(6) OFFICERS: Hold the rank of 1LT (O-2), WO2, or above. Documented evidence is promotion orders, PQR or certified 2-1 showing appropriate rank. It is preferable and highly recommended to assign CPTs with company command and platoon leader experience and 1LTs with platoon leader experience. Officers/Warrant Officers must be a graduate of BOLC B or Warrant Officer Basic Course. These experts in platoon and company operations are needed to teach our officer candidates. Waiver requests can be submitted by companies and routed through battalions and the SME before going to Fort Benning.

(7) NCOs: Hold the rank of SSG (E-6). Provide a copy of the promotion order.

(8) Complete proponent certification by submitting all certification/qualification documentation listed above to the OCS TASS battalion certification official, and conduct a 50-minute ABIC standard block of instruction. Must have all documented evidence and receive a 'go' on the instructor evaluation for certification. Documented evidence is a certification memorandum produced by the OCS TASS battalion documenting the findings of the certification official. The certification official will be ABIC/TAITC/BFITC qualified and of equal or greater rank designated by the TASS battalion commander. (See Annex F for sample memorandum.)

**3-4. Internal Instructor/Platoon Trainer Evaluation Program.** Each state OCS company in the OCS battalion must conduct an internal instructor/platoon trainer evaluation program, IAW TR 350-18, Chapter 2, the OCS battalion commander, or his/her designated state company representative must semi-annually evaluate all instructors/platoon trainers using the instructor performance checklist or platoon trainer evaluation checklist contained in Annex F. Guest instructors used periodically in the OCS program must be evaluated within a three month period prior to actual instructional period or be evaluated during the first instructional period.

**NOTE: Platoon trainer semi-annual evaluations may be either an instructor evaluation and a platoon trainer evaluation, or two platoon trainer evaluations.**

a. During consolidated Phase I training, the battalion must conduct a battalion level internal instructor/platoon trainer evaluation program. The OCS TASS battalion commander or his/her designated representative must evaluate all instructor/platoon trainers at least once during the consolidated training period using the instructor performance checklist or platoon trainer evaluation checklist contained in Annex F of this CMP. Individuals conducting evaluations during consolidated training must also be proponent certified, and be of equal rank or senior to the person being evaluated.

b. Specific guidance regarding the conduct of internal instructor/platoon trainer evaluations must be addressed in unit SOPs and must include who can evaluate, disposition of the completed evaluations, and what action is taken when an instructor/platoon trainer fails to meet the prescribed standard.

c. Instructors/platoon trainers not maintaining the standards must be decertified.



## Chapter 4. ADMINISTRATION

4-1. **Administration.** The proper and organized documentation of candidate prerequisites, performance, and commissioning requirements, as well as documentation of platoon trainer and instructor qualification and certification, and numerous other administrative requirements ease the operation of OCS training. Organized documentation ultimately eases the commissioning process for OCs and professional leaders ensure that all required documentation is up to date and organized. State OCS companies must maintain the following information as prescribed:

4-2. **Candidate Record.** The candidate record is initiated by the state OCS Company prior to arrival at Phase I training. This record contains documentation confirming that an individual officer candidate meets all OCS enrollment criteria (with appropriate waivers, if applicable) and has conducted all required training. It contains evidence of examination scores; leadership evaluations and leadership counseling; and numerous other academic, administrative, and commissioning requirements. When complete, this record communicates the level of excellence achieved by the officer candidate and may serve as the foundation for a candidate graduating with honors. The information may also be used to relieve officer candidates that cannot reach the level of performance required to graduate. It is therefore imperative that the candidate record be complete and organized at all times. Ultimately, the documents contained in the candidate record are used to build the candidate's federal recognition and commissioning packet. The nationwide scope of ARNG OCS training requires these records to travel across state and TASS battalion boundaries. Student academic records will be maintained IAW TRADOC Reg 350-18, para 3-25 b and c. The TASS BN/CO will maintain individual records for at least 12 months after the completion of training (24 months for students dismissed from a course). After the 12-month record retention period, retain End of Course Summary in the individual records and keep on file IAW AR 25-400-2. The following is the standard for candidate records:

a. OCS course prerequisite and prerequisite standards are outlined IAW NGR 600-100. The following list may change with changes to the regulation, but for the purpose of a national standard, the candidate record is organized in the following manner:

b. Organized in a folder with six parts (such as NSN 7530-00-990-8884). Part 1 is the left side of the folder when open and part 2 is the right side as if reading a book. Documents are organized from top to bottom as listed in each part. Parts that are sectioned off require a sheet with a tab separating the sections. The 6-part cover sheets (in OCS forms folder with CMP for reproduction) must be on blue card stock paper.

(1) Part I. **Administrative Data and Prerequisites**

- ☐ OCS Student Enrollment Checklist (Annex F).
- ☐ Emergency Contact Information sheet.
- ☐ OCS Application/Enrollment Form (local form or ATRRS print out).
- ☐ Letter of Recommendation.
- ☐ Social Security Card (Copy).
- ☐ ETS date (Must be after graduation date) (Copy of PQR or Extension Contract DA Form 4836).
- ☐ TDY/Travel Orders.

**OCS Prerequisites**

- ☐ Attachment Orders.
- ☐ Promotion Orders- to E-6 (If applicable).
- ☐ Birth Certificate (Copy).
  - ☐ Age (Not to exceed 41 years and 364 days at commission).
- ☐ Proof of U.S. Citizenship – Required if not born in US.
- ☐ Name Change Documents (if applicable).
- ☐ Chapter II Commission Physical (DD 2808/2807-1). (Must be within 24 months prior to the first day of school attendance IAW AR 40-501 paragraph 10-23b.)
- ☐ Periodic Health Assessment (PHA) is required if Chapter 2 physical is more than one year old.
- ☐ Medical NGB Waiver Request/Approval (if required).

- ☐ TAG (90 day waiver if no physical in file).
- ☐ Official College Transcript [min. 60 semester hours/ 90 quarter hours (traditional) or 90 semester hours (accelerated)].
- ☐ Proof of GT Score/Minimum 110 (DA Form 2-1).
- ☐ DD Form 214/DD Form 220/NGB 22/Military Training (AIT/1 year service waiver).
- ☐ OCS state enlistment option copy (if applicable DD Form 1966).
- ☐ Security clearance – Security verification letter/E-QIP/Joint Personnel Adjudication System (JPAS)
- ☐ Moral/Civil conviction waiver approval (must have approval prior to course start date).
- ☐ Request for any other waivers (if applicable), with developmental counseling statement to support that student is aware of waiver process.
- ☐ NGB 62 draft.

(2) Part II. **General Information**

- ☐ Candidate Profile Summary.
  - ☐ OC photo.
  - ☐ OC autobiography.
- ☐ Academic Section
  - ☐ Developmental Counseling Forms -for academic deficiency of exam failure.
  - ☐ Academic class standings.
  - ☐ Score sheets (WTBD Phase I).
  - ☐ All writing assignments, book reports, class assignments, essays.
- ☐ Disciplinary Section
  - ☐ Class action memorandums.
  - ☐ Board action results.
  - ☐ Developmental counseling forms –documenting relief, recycle.
  - ☐ Relief, recycle, or retention documents – to include notification to student in writing of recommendation for relief and the reason(s), IAW TRADOC REG 350-18.
  - ☐ Notification of relief (DD Form 785)–record of disenrollment from a phase of OCS training).
  - ☐ Memorandum to first general officer in OC's chain of command from the OCS battalion commander.
  - ☐ Appeal notification to student.
- ☐ Miscellaneous (as needed)
  - ☐ Phase completion certificates (local forms – if applicable).
  - ☐ Other documents.
  - ☐ \*NO EXAM SCORE SHEETS!

(3) Part III. **Command Rating**

- ☐ End of course summary (filed *on top of* this page). (Form in Annex F.)
- ☐ Summary of candidate's performance.
- ☐ LAP documentation.
- ☐ Chronological order with most recent on top.
  - ☐ Complete Leadership Evaluation Report (LER) packet consists of;
    - ☐ LER in-brief (light blue card).
    - ☐ Officer Candidate self-assessment (yellow card).
    - ☐ All Leadership Observation Reports (LORs) for the period (green card).
    - ☐ Completed LER (white bond).
    - ☐ FLER (used for FLX's and \*LRC. In-brief, self-assessment LOR and LER not needed with the FLER documentation).
    - ☐ \* LRCR used for LRC.

(4) Part IV. **Chronological Reports of Counseling**

- ☐ Counseling checklist.
- ☐ All documented counseling (other than LAP counseling).
- ☐ Examples of required counseling on DA Form 4856 or specific memorandum found in Annex F;
  - ☐ Prerequisite/inprocessing counseling (NLT Day 1, Phase 1).
  - ☐ Initial counseling (NLT 72 hours, Phase 1).
  - ☐ End of Phase counseling, Phase II.
  - ☐ Poor performance.
  - ☐ Missing documentation (see below examples);
    - ☐ Commissioning physical.
    - ☐ Medical waiver.
    - ☐ Security clearance.
    - ☐ College credit requirements.
    - ☐ Citizenship waiver.
    - ☐ AIT/ 1 year service waiver.

(5) Part V. **Peer Evaluations**

- ☐ Peer evaluation leadership assessment forms.
- ☐ Analysis of individual candidate peer evaluations.
- ☐ Peer evaluation counseling.

(6) Part VI. **Physical Ability Section**

- ☐ DA Form 705 APFT scorecard.
- ☐ DA Form 5500/5501-R Body fat computation worksheet (with general counseling form for not meeting standards IAW AR 600-9).
- ☐ Sick slips (if needed).
- ☐ Temporary profiles (if needed).
- ☐ Semi-annual weigh-in documentation (as required).
- ☐ DA Form 4856 counseling – monthly for candidates enrolled in the Army weight control program.

c. All candidate records are maintained at the battalion level for consolidated Phase I, Phase III and accelerated training. The company maintains all records for IDT Phase II training.

4-3. **Visitor's Folders (IAW TR 350-18 CH 4, paragraph 4-5).** All traditional, formal classroom instruction conducted in the cantonment areas must have a visitors table containing a visitor folder set up in the rear of the classroom. All training conducted in a field environment must have visitors folders posted at a central location in the field such as at the unit CP while training is conducted. It is the responsibility of each instructor to create and maintain this folder, bearing all responsibility for all documentation contained within. Visitor folders are contained in a tabbed 3-ring binder (2 inch or larger) and contain the following information IAW TRADOC regulatory guidance:

a. Tab A: Visitor sign in sheet (use local form).

b. Tab B: Current class roster (ATTRS R2 report minus SSNs).

c. Tab C: Attendance roster (ATTRS roster for annual training, and TR Form 270-R for Phase II IDT periods). Any and all rosters contained in this tab must be separated by class so that it can be determined if all candidates assigned to that classroom are in attendance.

d. Tab D: Current training schedule.

e. Tab E: Current ARNG OCS CMP and POI

- f. Tab F: Applicable TSP for block of instruction conducted.
- g. Tab G: Student materials such as handouts, practical exercises, and other information.
- h. Tab H: Waivers for the period/block of instruction.
- i. Tab I: Instructor memorandum for record verifying instructor credentials signed by the unit (BN) commander that can serve as a record of instructor credentials, provided those credentials are on file at the unit as required by this CMP, Chapter 3, paragraph 3-3 (7).
- j. Tab J: Critique sheets for class visitors.
- k. Tab K: Daily risk assessment worksheet (use DA Form 7566 prepared IAW AR 385-10 and FM 5-19).
- l. All required references for the block of instruction being taught. This is not required to be in the binder but may be placed beside the binder on the visitors table.

**Chapter 5. OFFICER CANDIDATE RELIEF, RECYCLE, AND RESIGNATION**

5-1. **Purpose:** This chapter prescribes the policies and procedures for the relief or recycle of an officer candidate in the OCS program, and provisions for the relief/dismissal of officer candidates from training.

5-2. **Scope:** These policies and procedures apply to all officer candidates in the ARNG OCS program during all phases of training, both traditional and accelerated.

5-3. **Definitions:** The ARNG OCS program provides two official remedies for Soldiers who do not meet course requirements, require disciplinary action, or cannot successfully continue OCS training. Commanders at all levels are not restricted to these remedies and may provide remedies as the situation dictates with the means available, however, these remedies are provided. Candidates relieved/dismissed, and resignations from the OCS program will be administratively reduced to the rank held prior to enrollment in OCS within one month. Date of rank (DOR) will be the DOR held prior to enrollment into OCS.

a. **Relief from Current Phase of Training:** This is the relief/dismissal of an officer candidate from their current phase of training for one of the reasons outlined in paragraph 5-6 i. The candidate is returned to their home state/unit of assignment for further action on relief from the OCS program, or to be recycled.

b. **Relief from OCS Program:** This occurs when a candidate is relieved/dismissed from the current phase of training and returns to their home state. The OCS company commander at their home state recommends relief from the OCS program to the GS/OCS battalion commander for approval.

c. **Recycle:** Recycle occurs when an officer candidate is relieved/dismissed from the current phase of training and returns to their home state/unit. The home state is responsible for determining if the candidate is to be recycled. If the candidate is recycled, he/she must start at the beginning of the phase in which they were relieved/dismissed. If the candidate is not recycled, he/she will be administratively reduced IAW the provisions specified in paragraph 5-3 above.

d. **Resignation.** Resignation occurs when an officer candidate resolves to leave OCS training, submits this request in writing, and is granted this request by the commander.

5-4. **Approval Authority.** OCS battalion and OCS companies in each State will develop and implement a detailed local SOP for relief and recycle IAW AR 350-1 and provisions of this CMP.

a. Accelerated and consolidated Phases I and III. The OCS battalion commander at an accelerated (all phases) or consolidate phase I and III has the authority to relieve Soldiers from the current phase of training for which they supervise if the Soldier fails to meet any of the reasons listed in 5-6i.

b. The authority to relieve or recycle a Soldier from the ARNG OCS program resides in the Soldier's home state only. Soldiers may only be relieved from or recycled in the OCS program by the authority of the first O5 in the candidate's chain of command (OCS battalion commander or GS battalion/RTI commander) in the officer candidate's home state. If the decision to relieve a candidate is made, the commander must determine if the Soldier is to be relieved with prejudice or without prejudice.

(1) Relief without prejudice. IAW AR 350-1, disenrollment for illness, injury, or other reasons beyond the control of the individual will be made without prejudice. This type of relief allows the Soldier the option of reapplying for a future class enrollment.

(2) Relief with prejudice. Occurs when in the opinion of the approval authority (described in Paragraph 5-4, b. above), the Soldier should be removed from the ARNG OCS program without the option to reapply for a future class enrollment. This is normally reserved for serious, involuntary reasons for relief.

**5-5. Removing Soldiers from POI Training.** The only person authorized to remove an officer candidate from training is the approval authority (described in Paragraph 5-4). OC's continue to attend all POI training until final disposition on relief, recycle or appeal is determined. The approval authority may remove OCs from POI training before final disposition if they determine that the presence of the officer candidate constitutes a significant training distracter for other candidates, or constitutes a safety hazard to other candidates or cadre. However, if an OC appeals and appeal is favored to the OC and they are allowed to continue in the OCS program, the responsible OCS commander must provide the OC with all missed/make-up training.

**5-6. Recommendations/Procedures for Relief or Recycle.**

a. Responsibilities.

(1) Platoon Trainer. The candidate must first be counseled in writing using DA Form 4856 that he/she is in jeopardy of being relieved or recycled. Counseling sessions will be documented and signed by all counselors and acknowledged by the student. The counseling must contain the areas in which the candidate must improve, or actions that the candidate must discontinue in order to maintain enrollment in the current class, along with a specified amount of time they have to complete the corrective action. If the candidate does not improve or does not discontinue actions as directed, the platoon trainer must counsel the candidate a second time in writing using DA Form 4856 recommending him/her for relief or recycle and explain the candidate's appeal rights IAW AR 350-1. Candidate's appeal rights are explained in paragraph 5-8 of this CMP. This evidence is included in the candidate's record, along with counseling forms concerning the recycle or relief. The platoon trainer then presents the OCS company commander with complete documentation and evidence concerning all efforts made on behalf of the candidate.

(2) Company Commander. The company commander reviews the training packet, interviews the candidate, and concurs or non-concurs with the recommendation. Record of interview will be in writing using DA Form 4856. If the OCS company commander decides that the candidate's actions do not warrant relief, the documents are maintained in the candidate record and the candidate continues in the OCS course. If the OCS company commander concurs with the recommendation, the packet is forwarded to the OCS battalion commander, the GS battalion/RTI commander, or the regimental/battalion commander, as appropriate.

(3) Commander (OCS Battalion, GS Battalion or Regimental). The commander reviews the packet along with the candidate's records, receives input from the candidate's chain of command, and interviews the candidate. The commander can concur or non-concur with the recommendation or take other action as appropriate. The commander will record his/her recommendation in Part IV of the Company Commander's DA Form 4856.

b. Dismissal for misconduct, lack of motivation, academic deficiency or failure to maintain physical fitness or height and weight standards will be recorded on the OCs End of Course Summary, if applicable, in accordance with the provisions of this CMP. In accordance with AR 600-8-2, Soldiers disenrolled for disciplinary reasons may be flagged. Soldiers disenrolled for misconduct may be barred from reenlistment in accordance with AR 601-280, AR 140-111 and NGR 600-100.

c. Disenrollment for illness, injury, compassionate transfer, DOR or other reasons beyond the control of the individual will be made without prejudice. The O5 commander will prepare a DD Form 785 (Record of Disenrollment for Officer Candidate – Type Training) to the OC's state OCS company/RTI commander stating the reason for termination and that the student will be eligible to re-enroll as soon as conditions that led to disenrollment no longer exist.

d. The federal UCMJ and/or UCMJ from one state do not apply to ARNG Soldiers under Title 32, U.S. Code from another state. Accordingly, school commanders will forward an ARNG Soldier's case to the Soldier's respective state adjutant general for appropriate disposition.

e. School commanders will ensure student records are complete and audit trails are maintained for all personnel actions.

f. Final Disposition. The candidate packet and recommendation for recycle or relief is then forwarded to the candidate's home state OCS or GS battalion/RTI commander for disposition.

g. Records. Records for a candidate being relieved are maintained for two years with a DD Form 785, (Record of Disenrollment from Officer Candidate Type Training) at the school relieving the candidate and then destroyed (IAW AR 25-400-2 and TRADOC 350-10). These records must include a completed 'End of Course Summary'. Recycled candidate's records are maintained on file until the candidate resumes training at the start of the phase which was previously dropped. The candidate record then again becomes the candidate's active record. All documents concerning the recycle are maintained in the candidate's record.

h. Reasons for Recycle. The state company commander with approval from the first 05/GS battalion commander determines the grounds for recycle. They may include, but are not limited to the following:

(1) Compassionate or hardship reasons. Health, welfare or financial problems of immediate family members that substantially interfere with successful continuation in the course or causes candidates to miss 12 or more hours of scheduled training.

(2) Disqualifying physical conditions (medical). Inability to complete the course due to poor health; or missing training through hospitalization, appointments, or duty limitations directed by a medical officer. Physical profiles are administered to prevent Soldiers from exercising personal zeal beyond their physical limitations. The company commander considers a possible recycle for profiles that:

(a) Cause a candidate to limit participation in physical activities, routine duty, or miss an excessive amount of scheduled physical training periods.

(b) Require confinement to quarters for a contagious sickness or illness causing the OC to miss 12 or more hours of scheduled training.

(c) Prevent a candidate from participating in mandatory course requirements or miss a portion of critical training. Examples are: Leaders' Reaction Course, APFT, FLX I, II, road marches, physical training runs, and so forth.

(3) Disciplinary reasons. Failure to cooperate in routine requirements or adhere to course standards of obedience. Candidates who receive repeated disciplinary actions are recommended for recycle or relief. Candidates committing any offense punishable by applicable laws and/or military regulations are considered for relief under this provision.

(4) Failed leadership evaluations. Candidates who fail to display improvement in leadership, and who continue to receive subpar leadership evaluations must be considered for relief or recycle. Candidate's who fail to achieve a leadership evaluation of an "E" or "S" during phase II or phase III will not graduate this phase and will be relieved for potential recycle. OCS company commanders should review the candidate's packet to ensure they meet the requirements to graduate from each phase.

(5) Failure to progress. Defines a candidate who shows marginal progress in performance, physical fitness, leadership evaluations, demonstrated motivation, attitude, aptitude, and conduct when compared to candidate's peers.

(6) Failure to meet graduation requirements.

i. Reasons for Relief. The OCS battalion commander at consolidated phase training or the state OCS BN/GS battalion commander determines the grounds for relief. They may include, but are not limited to the following:

(1) Honor code violations. A candidate will not lie, cheat, steal, nor tolerate those who do. A violation of this code may result in a recommendation for relief. See ARNG OCS Platoon Trainer Guide and ARNG OCS OC Guide for detailed information concerning the honor code.

(2) Academic failure. Academic failure is defined as a failure to attain 70% on any academic evaluations or the scheduled retest.

(3) Failure to progress. This is a candidate who fails to show progress in performance, physical fitness, subjective evaluations, motivation, attitude, aptitude, or conduct. Such progress is less than acceptable and is detrimental to the interest of the other students in the class.

(4) Disciplinary reasons. Failure to cooperate in routine requirements or adhere to course standards of obedience is subject to disciplinary action. Candidates who receive repeated disciplinary actions are recommended for recycle or relief. Candidates committing any offense punishable under applicable laws and/or military regulations are considered for relief under this provision.

(5) Failed leadership evaluations. Candidates who fail to display improvement in leadership, and who continue to receive subpar leadership evaluations must be considered for relief or recycle. Candidate's who fail to achieve a leadership evaluation of an "E" or "S" during phase II or phase III will not graduate this phase and will be relieved for potential recycle. OCS company commanders should review the candidate's packet to ensure they meet the requirements to graduate from each phase.

(6) Lack of adaptability. A candidate who fails to adapt to the stringent environmental conditions of discipline, soldierly habits, teamwork, and mental and physical stress can be considered for relief. A candidate who exhibits behavior contradictory to normally expected behavior can be referred to the OCS company commander for further evaluation prior to a relief recommendation.

(7) Lack of motivation. Lack of motivation is characterized by a candidate's failure to exert reasonable effort to succeed, constant malingering, or a personal attitude which demonstrates little or no desire to complete a course of action or mission.

(8) Falsifying or omitting facts or information. Knowingly falsifying or omitting facts concerning enrollment or commissioning requirements or documents.

(9) Misconduct. Misconduct includes but is not limited to:

(a) Candidate/candidate or candidate/cadre fraternization. OCS is a gender-integrated environment and is an intense 24-hour a day course of instruction. Candidate teamwork and loyalty is paramount in the development of leaders. A candidate's actions must be embedded in the Army's core values; loyalty, duty, respect, selfless service, honor, integrity and personal courage. Therefore, candidates do not engage in fraternization. Failure to follow these guidelines may result in relief from the course. Male and female candidates and cadre interact closely with one another and must exercise self-discipline and good judgment to prevent compromising situations. Male and female candidates are not authorized to engage in any real or perceived conduct with one another that is conduct unbecoming of an officer and contrary to accepted Army standards for values, ethics, and the current Code of Conduct. For detailed information on what constitutes fraternization see ARNG OCS Platoon Trainer Guide or ARNG OCS OC Guide.

(b) Unauthorized alcohol use.

(c) Integrity issues.

(d) Possession, use, sale, or transfer of any narcotic, hallucinogen, controlled substance or narcotics paraphernalia.

(e) Conduct that would constitute a violation of applicable laws and/or military regulations and/or the Honor Code.



**5-7. Candidate Resignations.** Every effort must be made by the ARNG OCS cadre to counsel and advise an individual toward the successful completion of OCS. In cases where these efforts do not prevent an officer candidate from requesting resignation the following procedures are followed.

a. Responsibilities.

(1) Officer candidate. The officer candidate must submit their request for resignation from the ARNG OCS program in writing to the cadre chain of command.

(2) Cadre. The platoon trainer counsels the candidate on a DA Form 4856 detailing the procedure for and the consequences of resignation. The platoon trainer also submits written comments on the candidate's potential to the company commander, along with the candidate's written resignation and complete candidate record.

(3) Company Commander. The company commander interviews the candidate and counsels the candidate on a DA Form 4856 on the consequences of his/her resignation. He/she may add his/her own comments to the platoon trainer's written comments on the candidate's potential before forwarding the entire packet to the OCS/GS battalion or regimental commander.

(4) OCS or GS Battalion Commander (approval authority). The battalion commander interviews the candidate, counsels the candidate on the consequences of his/her resignation, and accepts the candidate's resignation if the candidate is determined to resign from the ARNG OCS program. The final decision of the battalion commander is recorded on a DA Form 4856 Part IV initiated by the OCS company commander.

b. Final Disposition. After the battalion commander accepts the officer candidate's resignation, the candidate is removed from training. The platoon trainer and the OCS company commander complete the End of Course Summary and place it in the candidate record.

c. Records. Records are maintained on file at the home state on all officer candidates who resign. These records include the completed End of Course Summary on the officer candidate.

d. Withdrawing a resignation. If the candidate elects to withdraw the resignation before it is forwarded to the OCS or GS battalion commander, the documents are retained in the candidate record with the DA Form 4856 Part IV completed by the company commander explaining the candidate's decision. A resignation in lieu of relief is processed as a relief.

e. Resignation. Officer candidates will not be given the opportunity to resign in lieu of academic or leadership dismissals.

**5-8. Candidate Rights.** The following procedures apply in cases where relief/dismissal is considered for motivational, disciplinary, or academic reasons:

a. IAW TR 350-18, paragraph 3-30 and AR 350-1, paragraph 3-14e, (ADT/IDT), the platoon trainer will notify the student in writing using a DA Form 4856 of the proposed action, the basis for the action, the consequences of disenrollment and explain the candidate's right to appeal. The platoon trainer will advise the student that they will acknowledge by written endorsement within two duty days upon receipt of the written notification of dismissal action. The endorsement must indicate whether or not the student intends to appeal the dismissal action. The platoon trainer will advise the student that any appeal must be submitted within seven duty days after receipt of the written notification of the dismissal action by the battalion commander. Appeals will be submitted to the school commandant or commander.

(1) Appeals will be forwarded to the school commandant or commander who will refer the proposed action and the appeal to the OSJA to determine legal sufficiency of the dismissal decision. All appellate actions will become part of the

student's case file. Commandants and commanders will make their final decision on dismissals after considering the supporting OSJA recommendation. In cases where an OSJA is not available, the commandant or commander will forward appeals to the commander who has GCMCA for review and final decision.

(2) Students who elect to appeal will remain actively enrolled in the course pending disposition of their appeals IAW TRADOC Reg 350-18, para 3-30.

(3) All appeals must clearly provide new evidence not previously considered by the approving authority.

b. Resign in lieu of relief. Candidates are counseled that resignation is an option but it voids any appellate rights and that it may not necessarily better their chances of returning to OCS.

c. Appeal Packets consist of the appeal consideration memorandum and at a minimum, the following attachments, if applicable. Local OSJA offices may require more documentation.

(1) Third party statements.

(2) Statements from the chain of command.

(3) Other official documents or evidence.

d. Upon receipt of the appeal packet, the RTI commander ensures the packet is complete and coordinates for OSJA review.

e. The OSJA reviews the appeal packet for legal sufficiency and provides the RTI commander with their recommendation.

f. The RTI commander will make the final decision after considering the OSJA's recommendation.

g. The RTI commander will notify the approval authority of the final decision and counsel the candidate of the decision.

h. The decision of the RTI commander is final.

i. If the candidate loses the appeal they will be relieved from training, out processed per the local SOP, and returned to their home state for further disposition.

j. All paperwork regarding any relief procedure will be maintained by the OCS Battalion and a copy sent to the candidate's home state. Relief/disenrollment paperwork is maintained for 2 years IAW TRADOC Regulation 350-18 para 3-25b, and then destroyed IAW 25-400-2.

k. Relief flow charts are located in Annex G of this CMP.

**Chapter 6. COURSE DESIGN, MATERIALS AND SUPPORT REQUIREMENTS**

**6-1. Course Design.** USAIS designed ARNG OCS to be a hard-hitting leadership development course presented in a 24-hour-a-day training environment. The OCS Platoon Trainer Guide contains a detailed discussion on how to establish and maintain the OCS learning environment. All phases to include Pre-OCS will be IAW para 2-6 i and j of this CMP regarding corrective training and hazing.

**6-2. Course Structure.** The OCS lessons/modules are taught in each phase as prescribed by this CMP and POI.

**a. Phase Structure.**

(1) Pre OCS (IDT). Pre OCS is not a formal OCS POI phase and no programmed instruction is taught in this phase. It is highly recommended state OCS companies conduct a three IDT pre OCS program. This phase consists of instruction on basic Soldier skills, drill and ceremony, physical training, administrative preparation, and is to be conducted in a non-stressful environment. The goal of this phase is to prepare prospective candidates to succeed in OCS. It is highly recommended that the state require pre OCS because it increases the OCs success rate in the program.

(2) Phase I (ADT). The OCS TASS battalion conducts 16 consecutive days (1 travel/report day and 15 training days) of OCS training at a consolidated site. Day 1 will be devoted to reporting and in-processing. Day 16 of the 16-day training course may be devoted to out processing, turn-in of supplies and equipment, travel from training site, maintenance, and recovery.

(3) Phase II (IDT). The state OCS Company conducts 48 separate unit training assemblies over a training year.

**OR**

Phase II (accelerated). The OCS TASS battalion conducts 28 consecutive days of OCS training at a consolidated site currently conducted at Alabama, South Dakota and Fort Indiantown Gap, Pa. Day 1 and Day 28 (same as paragraph 6-2a (2) above)

(4) Phase III (ADT). The OCS TASS battalion conducts 16 consecutive days (1 travel/report day and 15 training days) of OCS training at a consolidated site. Day 1 will be devoted to reporting and inprocessing. Day 16 of the 16-day training course may be devoted to out processing, turn-in of supplies and equipment, travel from training site, maintenance, and recovery and is currently conducted at Alabama, South Dakota, Fort Indiantown Gap, Pa, and Washington.

(5) Accelerated Officer Candidate School (AOCS). Training at a national consolidated site consists of 58 consecutive days of OCS. Currently conducted at Alabama, South Dakota and Maryland/Fort Indiantown Gap, Pa. Day 1 will be devoted to reporting and inprocessing and Day 58 may be devoted to out processing, turn-in of supplies and equipment, travel from training site, maintenance, and recovery.

**b. Instructional Sequencing.** This CMP and the POI divides the training lessons/modules into three academic phases. Annex D of this CMP contains the required course flow.

**6-3. Instructional Methodology.** TRADOC recognizes four primary methods for teaching Army doctrine. The TSP for each lesson/module prescribes the methodology for each block of instruction. The training environment must support the following prescribed methodology:

**a. Programmed Instruction (P).** Lessons/modules identified as programmed must be formally taught and tested. Candidates must demonstrate task mastery through practical application of the terminal learning objective (TLO).

b. **Integrated Instruction (I).** Lessons identified as integrated are taught during a programmed instruction lesson/module dealing with an associated topic. The programmed lesson/module supports the understanding and acquisition of the skills and knowledge required to accomplish the task.

c. **Refresher Training.** This training involves reacquainting the candidates with tasks previously taught and tested. Since candidates must have completed an initial entry training program before enrollment in OCS, they have received programmed instruction on some of the WTBDs. In the OCS environment, the candidates train and test each other on these tasks. Refresher training must not be confused with remediation.

6-4. **Instructional Media.** The instructional media used in OCS include printed material, visual and audiovisual materials, computer programs, and training aids.

6-5. **References.** Each TSP lists all instructor references required to teach the TLO in each lesson. The POI lists the references required to be on-hand in the RTI learning center. Instructors use the learning center references to prepare for lessons. Annex C of this CMP identifies references required as issue items to the candidates. Before a class graduates, reusable reference materials should be recovered for reissue to a subsequent class.

6-6. **Training Support Packages (TSPs).** Training support packages contain the materials lists, resourcing requirements and lesson outlines required to teach the OCs the individual blocks of instruction. It provides the instructor with the framework (outline) required to conduct standardized training.

a. The Army Training Support Center distributes TSPs for the WTBDs. The OCS company commander must rely on the POI to fit each TSP into the appropriate module. In some instances, USAIS has modified the instructional methodology based on the needs of the candidates and the characteristics of the OCS environment. Annex D of this CMP identifies lessons and provides a course flow. Training support packages are requisitioned thru each Battalion thru the SME from USAIS.

b. USAIS develops, publishes and distributes training support packages specific to OCS. In addition to specific lesson TSPs, USAIS generates end-of-module examinations. USAIS supports a means to quantify a candidate's academic excellence through the use of end-of-module exams.

c. In those instances where the candidate must teach a refresher task, the OCS company commander ensures the candidate receives a copy of the applicable TSP.

d. Instructors must adhere to all the requirements contained in the TSP and must ensure that the overall objective of the TLO and the subsequent ELOs are met. Moreover, instructors must ensure that all examination requirements are satisfied. However, instructors are authorized and encouraged to modify the information and format of the information in the TSP to enhance the block of instruction taught provided the aforementioned requirements are fulfilled. Instructors are encouraged to provide personal experience and relate material IAW the Army's current operating environment to enhance OCS instruction.

6-7. **End of Module Testing.** OCS prescribes ten end-of-module exams. These exams are performance oriented and/or written exams. They supplement the practical exercises required of each lesson TSP. These exams measure the candidate's ability to acquire, retain, and apply task mastery. Exam results provide the state OCS company commanders with qualitative statistics on the class' academic standing and the quality of instruction received. Candidates must attain a minimum passing score of 70% on each exam and must pass all ten exams to be eligible for graduation and commissioning. They are allowed only one retest for each end-of-module exam they fail. Chapter 10 of this CMP provides detailed information regarding the scope of the examination process in the OCS environment.

**NOTE:** Under exceptional circumstances, the OCS battalion/regimental commander during Phases I and III, accelerated OCS, and accelerated Phase II, or the OCS battalion or GS battalion/RTI commander during Phase II – IDT, may authorize one additional retest for candidates with significant leadership potential. Evidence supporting this claim must be filed in the candidate's packet. A memorandum for record from the company commander recommending an additional retest and stating the candidate's leadership potential must be included. This memorandum must be specific to the individual candidate.

### Course Support Requirements.

#### 6-8. Facilities Requirements.

a. **Administrative.** Suitable office space to house the day-to-day administrative activities associated with the conduct of OCS is required. This includes individual office space for the OCS command group and platoon trainer staff, preparation area for the instructors, and space for clerical support, training records/files, and lesson materials storage.

b. **Permanent Classroom.** A suitably equipped, safe, designated classroom with tables, chairs, lectern, electrical outlets, sufficient illumination (natural or artificial), and ventilation, as well as other standard classroom furnishings such as wastepaper receptacles, bookcases, pencil sharpeners, and a blackboard/whiteboard is required. Arrange these furnishings in such a manner as to facilitate instruction without interference due to poor acoustics and inadequate seating arrangements. Provide a visitor's table and chair in the rear of the classroom. Ensure latrines are accessible and nearby. Provide for climatic controls to ensure training is not diminished due to excessive cold or heat.

c. **Temporary Classroom.** For those occasions when group instruction is more effectively conducted in a field location, a temporary classroom facility is used. This could include the use of a tent equipped with sufficient quantities of field tables and chairs, a bleacher setup, or simply a relatively flat area to conduct instruction. Instructors must rely on chart packs or hands-on demonstrations to reinforce teaching points in this environment.

d. **Training and Maneuver Areas.** Sufficient land area to accommodate field training is required. OCS requires candidates to conduct tactical training in a field environment. The area must be large enough to accommodate a light Infantry-sized element comparable to the number of OCS students being trained. Candidates must learn how to maneuver through various terrain using land navigation skills. The distance between points and the course length must meet the standards prescribed in the TSP.

e. **Ranges/Training areas.** Requirements for multipurpose ranges and training areas must be carefully planned and requested on a timely basis. Access to and use of these ranges must be scheduled well in advance. Forecasting and requesting of ranges and training areas must be accomplished IAW local policies/procedures.

f. **Obstacle Course/Confidence Course.** The conduct of OCS requires the use of a standard obstacle course, either conditioning or confidence, as described in TC 3-22.20, Army Physical Readiness Training, during ARNG OCS Phase III training.

g. **Leadership Reaction Course.** The conduct of OCS requires the use of a Leadership Reaction Course (LRC) during Phase III training. This is a specialized range with several stations. Each station is designed to pose a unique leadership problem to a squad leader in a tactical setting and present the leader with a challenging situation that requires the development and execution of a plan to solve the task. There must be enough stations to accommodate a twelve-Soldier squad rotating through the leadership position so that no stations are repeated by the same squad.

h. **Combat Water Survival Test (CWST) Site.** Phase III training requires that candidates attempt the combat water survival test. Phase III locations must have a facility where OCs can walk off of a stable three meter platform into the water. Water depth must exceed the height of the tallest candidate by three feet. The site must also allow for the candidate to conduct the underwater equipment removal and to swim fifteen meters in full combat gear to a shore or poolside.

**It is prohibited for this site to be located where there is flowing water.**

i. **Billets.** Provide adequate billeting facilities sufficient to house the number of candidates in each class. Billets should provide adequate storage for uniforms and equipment and latrine/shower facilities that can accommodate the size of the class. Chairs and desk for student study are optional in the billeting areas.

j. **Dining Facility.** Provisions must be made to ensure the candidates are provided with full dining facility privileges in accordance with applicable Army and NGB regulations, and local policy.

k. **Learning Center.** In an effort to reduce the cost of reproducing reference materials in mass quantities, learning centers are established at the RTI. The learning center houses several copies of all reference materials listed in Annex B of this CMP and the POI. In addition, the learning center should have several computer stations for use by the candidates and adequate furnishings to support independent study. Candidates must have the opportunity to maximize the use of available systems. The requirement for learning center access by officer candidates is a Phase II requirement only and is not feasible during Phase I and III.

l. **Counseling Space.** A room, or rooms, designated as counseling space must be provided to the platoon trainer staff to counsel individual candidates. Although counseling can occur in various settings, the OCS environment requires a private setting for the conduct of formal counseling.

m. **Study Hall.** A designated location for individual after-hours study must be available.

n. **Computer Lab/Media Center.** While the OCS courseware does not specifically require officer candidates to produce automated products, it is recognized that several of the courseware assignments can be significantly enhanced with access to the internet and automation equipment. It is recommended that officer candidates have scheduled access to automation equipment and the internet during Phase II training with a computer to candidate ratio of 1 to 4. This requirement is not feasible or required during Phase I or Phase III training.

6-9. **Training Support Resources.** Various training aids/devices, weapons systems, ammunition, supplies and equipment, and transportation requirements exist throughout the conduct of OCS. Refer to the specific TSP to plan for these training support requirements. Training aids are obtained from the Training Aids Support Center (TASC) supporting the local training activity. Requisition of training aids will be accomplished IAW local TASC policy and procedures and DA Pam 350-9, Index and Description of Army Devices. Training aids/devices are used to enhance training and student learning.

## Chapter 7. IMPLEMENTATION OF TRAINING

### 7-1. DETERMINING COURSE MATERIALS REQUIREMENTS.

a. The training support package itemizes the course materials required to teach each lesson. Use this information to calculate projected needs based on class size when planning and preparing the YTP/YTC. The total number of candidates training simultaneously has a direct impact on the training resource requirements. The availability of training areas, classrooms, and ranges impacts the scheduling of resourcing.

b. As a rule, there must be at least one copy of the TSP for each instructor and one copy posted in each visitor's folder. The learning center must have the references available to the instructor for preparation. Instructors must ensure sufficient quantities of training aids are on-hand to support the class size and ensure the correct numbers of handouts are on hand for each candidate to receive a set.

c. Sufficient copies of all end-of-module examinations and test materials must be maintained by the test control section to provide each candidate a set for the examinations.

7-2. **Quality Control.** The OCS TASS battalion commander and his/her staff continually monitor and assess the quality of training conducted by all state OCS companies in the battalion. The battalion strives to create an environment conducive to quality training and provides every opportunity for subordinate units to recommend improvements in training or administration of OCS. Producing quality training is a continuous day-to-day process with multiple stages, from planning to implementation. The following are the required mechanisms used by USAIS, the SME, the OCS TASS battalion and state OCS companies to ensure the quality of training in OCS.

7-3. **Cadre to Officer Candidate Ratio.** OCS battalion and company commanders must ensure that platoon trainer/instructor to candidate/student ratios are adhered to during all OCS training. TDA assigned, attached, and guest instructors and platoon trainers may be counted/included in the standards for instructor/platoon trainer to student ratio.

a. The minimum platoon trainer to candidate ratio is 1:15. Commanders may require a higher platoon trainer to candidate ratio (e.g. 1:10) for a specific phase of OCS training to enhance the quality of instruction, counseling, and mentorship but cannot exceed the 1:15 ratio without USAIS approval.

b. Commanders must meet and maintain the instructor to candidate ratio prescribed in each TSP for each block of scheduled instruction. These ratios vary from subject to subject depending on the type and difficulty of the lesson presented. It is incumbent on the OCS company commander to plan and properly schedule the instructor staff to meet these ratios.

7-4. **Administering Training and Testing.** The following guidance is used to administer OCS training and testing:

a. Assign a roster number to each candidate and a class number to each class upon entry into OCS. The roster number consists of the two-letter state postal abbreviation and a three-digit randomly assigned number for each individual candidate. The class number is determined by the state or territory and can be taken from ATRRS. To prevent confusion in record keeping, all course documents must reflect both numbers.

b. Conduct instruction and testing according to the published training schedule, appropriate TSP, applicable TRADOC/Army regulatory guidance and applicable local regulations.

c. Examination answer sheets are graded locally. If a test is passed, the state OCS company (or if ADT, the consolidated site) retains the answer sheets on file until completion of the course at which time they will be destroyed. If a test and a retest is failed, those answer sheets are kept for two years (see TRADOC Reg. 350-10 paragraph 2-8c, subparagraph c). **DO NOT** file the answer sheets in the candidate's record. They are protected by test control measures

employed by the RTI. **Enter** the candidate's score on the End of Course Summary contained in the candidate training record.

#### 7-5 **Remediation.**

a. Remediation retrains candidates who have failed to demonstrate task mastery or who have failed to obtain a passing score (70%) on an end-of-module exam. Remediation must be taken seriously by both the instructor and the candidate to ensure the candidate fully understands the material. Retesting does not occur until remedial training is completed. All remedial training and retesting must be reflected on the company/battalion training schedule and cannot be scheduled during other POI required training.

b. Remediation can be accomplished in a variety of ways such as assigned readings, one-on-one tutoring, additional supervised practice, or a combination of the three. Remediation must not be scheduled during other scheduled academics or POI required training. There is no requirement for the instructor who originally taught the module to conduct the retraining.

c. Other candidates may be assigned as peer tutors. If a candidate needs additional assistance in mastering a skill, the instructor can select another candidate who has already demonstrated task mastery. Frequently, a peer tutor is more effective than an instructor or cadre member because they have the student's perspective. The same candidate should not be selected more than once per phase to act as a peer tutor, unless he/she agrees otherwise. This technique should be used sparingly and must be supervised by an instructor or cadre member.

d. A candidate missing entire lessons or portions of lessons must be provided the opportunity to make up the missed training. He/she can accomplish this by attending another OCS company in an RSTA status or by rescheduling the instruction with his/her own OCS Company in several SUTAs. Documentation showing that the candidate made up missed lessons must be included in the candidate's file.

e. All retraining and remediation must be documented on an approved training schedule.

f. Candidates who miss or cannot actively participate in 12 or more hours of scheduled training may be recommended for recycle. Only the battalion commander can make exceptions to this policy.

7-6. **Counseling.** Keen observation of candidate performance and detailed, caring counseling is the cornerstone of OCS training. This training/counseling is where the candidate acquires the leadership skills and attitudes that enable him/her to become a successful officer. The platoon trainer uses the counseling tools provided in the OCS Platoon Trainer Guide and counsels candidates IAW the OCS LAP provided in Chapter 9 and the OCS Platoon Trainer Guide. Forms used in leadership counseling are provided in Annex F of this CMP. It is imperative that platoon trainers and NCOs skillfully use and process the LAP tools to impart leadership skills and knowledge of the officer candidates.

7-7. **Field Training.** Field training is used to enhance the cadre's ability to evaluate candidate leadership in a more challenging environment. The primary purpose of these exercises is leadership assessment, not tactical proficiency.

a. **Phase I—Land Navigation/Warrior Tasks Battle Drills-I.** Medical and weapons tasks, along with chemical, biological, radiological and nuclear tasks are the focus of these drills. Additional tasks can be added as needed. WTBD-I is conducted during Phase I and is conducted concurrently with the land navigation field training to accomplish three goals

(1) First, it develops the candidate's leadership abilities by increasing his/her competence in team and individual skills. The field environment provides an opportunity for immediate feedback on leadership and followership.

(2) Second, training and communicating effectively in a field environment increases confidence and endurance.



(3) Third, it provides an opportunity to evaluate each candidate's ability to prepare and present instruction. Candidates instruct their peers on all Warrior Tasks and Battle Drills. Although all of these tasks were previously taught and tested in basic training, candidates must be able to apply these skills during OCS training events. It is therefore necessary for candidates to receive refresher training on these tasks. Each candidate is assigned one or more tasks to teach and the candidate instructor must validate the proficiency of his peers on the task by conducting a performance-oriented test. Candidates failing to demonstrate task mastery must receive remedial training prior to retesting.

b. **Phase II–Warrior Tasks Battle Drills II.** This exercise is conducted during Phase II IDT/accelerated in a garrison or field environment. Field environment is recommended.

c. **Phase II–Field Leadership Exercise I.** This exercise is conducted in a field environment (48-hour continuous operation) during Phase II IDT/accelerated.

d. **Phase III–Field Leadership Exercise II.** This exercise is conducted during Phase III ADT. It is a tactical exercise designed to provide the candidates with an opportunity to apply skills learned in Phase II, basic Infantry tactics, while employing leadership at squad and platoon level. Although tactical proficiency is not the focus, the ability to successfully employ these skills becomes part of the candidate's demonstrated leadership performance evaluation.

## Chapter 8. NON ACADEMIC REQUIREMENTS

8-1. **General.** The OCS program contains several opportunities and training events for officer candidates to train and excel that are not testable blocks of instruction in the traditional sense. One of the missions of OCS is to challenge OCs physically and mentally in a demanding environment. The following non-academic training events provide the officer candidates with physical and mental challenges, and establish physical and mental standards for the officer corps.

8-2. **Physical/Training Requirements.** Being a professional Army officer is a physically demanding endeavor. Moreover, officers request physically demanding performance from their subordinates. To lead from the front, the officer must first be able to accomplish physically demanding tasks on their own. The goal of the OCS physical training program is to improve the physical fitness of the officer candidate, instill a fitness philosophy in, and teach the proper method for conducting a unit-level physical fitness program. Physical fitness training includes confidence and obstacle courses, foot marches, and unit runs. Frequently challenging an OCs physical fitness keeps them mindful of the pursuit of physical fitness excellence and the need to conduct regular physical training between drill weekends. The following are phase completion and graduation requirements for all officer candidates.

### a. Army Physical Fitness Test.

(1) Before reporting for OCS Phase I training, officer candidates must take and pass the standard three-event APFT. No alternate events are authorized per AR 350-1, as prescribed in TC 3-22.20 within 60 days prior to the start of Phase I training. The state OCS company commander, or his/her designated representative within the state OCS Company, administers the APFT to potential OCs. If the candidate fails to meet the minimum APFT standards, he/she is removed from pre OCS and is not eligible for Phase I training. DA Form 705 must be completed IAW TC 3-22.20 indicating a passing score 'For Record.'

(2) Officer candidates must also pass a second standard, three-event APFT during Phase II in order to go on to Phase III and subsequently graduate OCS. This second APFT is administered by the OCS company commander or his/her designated representative within the OCS Company. This second APFT must be completed within 60 days prior to the start of Phase III training during traditional (IDT) Phase II training. During Phase II accelerated OCS training, the second APFT is conducted within 20 days prior to the start of Phase III training.

b. **Three Mile Release Run.** Candidates must complete a three mile release run without assistance and in the designated time standard. MALE time standard is 27:00 (or 9:00 per mile). FEMALE time standard is 29:15 (or 9:45 per mile). A candidate who fails to meet the standard will be given one retest.

c. **Foot Marches.** Foot marches are mental and physical challenges for the OCs, as well as conditioning exercises to enhance physical fitness. Foot marches give candidates formidable obstacles to overcome, instilling a sense of accomplishment when completed. There are three required foot marches conducted in OCS. Conduct IAW FM 21-18, *Foot Marches*, for detailed information concerning foot marches.

(1) **Five Mile Foot March.** The march is conducted in Phase I along a suitable, five mile route. The uniform is the (ACU), boots, helmet, LCE/LBV (with two full canteens at the start), weapon, and rucksack. Rucksack must weigh from 35-40 pounds at the beginning **and completion** of the foot march. Officer candidates must complete the five mile foot march without assistance in 1 hour, 45 minutes. Successful completion of the five mile foot march is a Phase I requirement. A five mile foot march retest must be completed by the candidate within 1 hour, 45 minutes without assistance in Phase I before the candidate is credited with completing Phase I. A five mile foot march shall be conducted toward the beginning of training to allow enough time for at least seven days recovery time before being retested. The failure of a five mile foot march must be annotated on a DA Form 4856.

(2) **Seven Mile Foot March.** The march is conducted in Phase II along a suitable, seven mile route. Uniform is the ACU, boots, helmet, LCE/LBV (with two full canteens at the start), weapon, and rucksack. Rucksack must weigh between 35-40 pounds at the beginning **and completion** of the foot march. Officer candidates must complete the seven mile foot march **without assistance** within 2 hours and 30 minutes. Successful completion of the seven mile foot march is required before officer candidates complete Phase II training. Candidates who do not successfully complete the seven mile road march in Phase II are not allowed to move on to Phase III training. Retesting is authorized and must replicate the uniform, distance, weight, and time requirements listed above, and must be completed in Phase II. This retest cannot be in conjunction with the ten mile foot march.

(3) **Ten Mile Foot March.** The march is conducted in Phase II along a suitable, ten mile route. Uniform is the ACU, boots, helmet, LCE/LBV (with two full canteens at the start), weapon, and rucksack. Rucksack must weigh between 35-40 pounds at the beginning **and completion** of the foot march. Officer candidates must complete the ten mile foot march **without assistance** within 3 hours and 30 minutes. Successful completion of the ten mile foot march is required before officer candidates complete Phase II training. Candidates who do not successfully complete the ten mile road march in Phase II are not allowed to move on to Phase III training. Retesting is authorized and must replicate the uniform, distance, weight, and time requirements listed above, and must be completed in Phase II.

d. **Obstacle Course** The obstacle course provides the officer candidate with a physically demanding and fun training event that builds unit cohesion while physically conditioning the OC. The obstacle course may be a conditioning or confidence type of course. Many obstacles on a confidence course may be high or demanding, possibly causing the Soldiers to fear or be uncomfortable with their ability to successfully negotiate the obstacle. It is the overcoming of this fear that leads to Soldier confidence, and ultimately leader confidence. Soldiers do not negotiate these obstacles at high speed and are not timed. Some obstacles require Soldiers to negotiate as a squad, while others are individual obstacles. Candidates execute a standard confidence course or conditioning course in squad sized elements as rapidly as possible. To pass the obstacle course requirement, OCs must make a valid attempt at each obstacle on the course. Validity of the attempt is determined by the platoon trainer conducting the obstacle course training. Candidates who do not make valid attempts at the obstacles are counseled in writing on DA Form 4856 and receive a 'no-go' for the training event. This event is conducted in Phase III. Officer candidates must receive a 'go' on the obstacle course to complete Phase III OCS training and to graduate OCS. See TC 3-22.20, for more information concerning obstacle course requirements.

e. **Combat Water Survival Test.** The Army cannot afford to have leaders that are paralyzed when confronted with negotiating water. Leaders must successfully negotiate water while leading other Soldiers that may be paralyzed with their fear of the water. Leaders must also be able to demonstrate their ability to control their emotions and lead others in situations where they may not be comfortable and may fear their own personal safety (personal courage).

**Note:** Given the nature of this training event, commanders must complete thorough risk analysis and risk mitigation through the use of water safety instructors, medics, and poolside hook or float devices. **It is prohibited to conduct this event in flowing water.**

Officer candidates **must attempt** to complete the following 3 events:

**A 15-meter swim using any stroke;** with rifle and wearing LCE equipment, ACUs and boots; without losing rifle and equipment, and without showing unusual signs of fear or panic. **IT IS MANDATORY THAT CANDIDATES ATTEMPT THIS EVENT. FAILURE TO ATTEMPT MAY RESULT IN RECOMMENDATION FOR RECYCLE.**

**Equipment Removal.** Enter water from pool side, back facing the water, submerge to a depth of three meters, discard weapon and LCE equipment, surface and swim to pool side without showing signs of fear or panic.

**Negotiate a 3-meter drop.** Walk blindfolded off a 3-meter diving board with weapon and LCE equipment. After entering the water, remove blindfold and swim to pool side without losing rifle and LCE equipment and without showing unusual signs of fear or panic.

This event is conducted in Phase III and is required for graduation from OCS. Candidates who fail to attempt the combat water survival test (all events) are counseled on a DA Form 4856 and will not complete Phase III training or graduate from OCS.

**f. Develop a Platoon/Company Combatives Program.** Combatives training is a block of instruction that is recommended to be taught (at a minimum) by a Level 1 Combatives certified instructor. The training will be presented in order for the candidate to gain greater awareness of the modern Army Combatives program. This training is conducted during Phase II.

**g. Leadership Reaction Course.** The LRC is a squad sized training event conducted on a specialized range with several stations. The course builds cohesion and teamwork at the squad level, emphasizing leadership traits embodied in the behavioral dimensions of the leadership assessment program and problem solving skills. Each station is designed to pose a unique leadership problem to the squad leader in a tactical setting, presenting the candidate with a challenging situation that requires the development and execution of a plan to solve the task. The objective of LRC is to evaluate each candidate's leadership potential under field and simulated combat conditions while observing their problem solving skills. Each candidate in the squad must serve as the squad leader at least one time during the event. The LRC is used to evaluate and counsel the squad leader for each station on their performance.

**8-3. Peer Evaluations.** Part of OCS training is to prepare candidates to rate subordinates. In the OCS environment, the vehicle used to accomplish this is the peer rating process. The candidates conduct peer evaluations three times during OCS. The peer rating process is used throughout the professional development of the officer (such as the BOLC B-Branch Specific Training and Captain Career Course). Peer evaluations are an invaluable tool for the platoon trainer. Results of a peer evaluation are useful in periodic counseling sessions and providing the candidate with another point of view concerning their leadership skills.

a. Peer evaluations are conducted three times in OCS.

(1) Peer evaluation # 1 is conducted towards the end of Phase I using the Peer Evaluation Leadership Form contained in Annex F.

<p><b>Note:</b> Prior to the conduct of peer evaluation # 1, the OCS battalion must conduct the lesson on peer performance evaluations for all candidates.</p>
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(2) Peer evaluation # 2 is conducted towards the middle of Phase II traditional and the second week of Phase II accelerated OCS training using the Peer Evaluation Leadership Form in Annex F.

(3) Peer evaluation # 3 is conducted towards the end of Phase II Traditional prior to departure for Phase III and is conducted in the last week of Phase II accelerated OCS training using the Peer Evaluation Leadership Form contained in Annex F.

b. The platoon trainer must brief the classroom/platoon with the following instructions prior to them completing the peer evaluation form in Annex F: Ensure the candidates name is printed at the top the evaluators name printed and signed at the bottom of the page. Rate the candidate's actions according to the 1 to 4 scale. Add all numbers for a total at the bottom right corner of the form. On the back, the evaluator gives three areas the candidate needs to sustain and three to improve upon. Also on the back, for all 1s (strongly agree) or 4s (strongly disagree) the rater must write an explanation

for the evaluation. It is important to stress to candidates that these evaluations are to be taken seriously and used as a tool for improving leadership development/skills.

c. When conducting peer evaluations, the platoon trainer must counsel each candidate on a DA 4856 (see Annex F for example) with the data collected to include: individual overall ranking within their classroom/platoon, and the top three most frequently written sustainment and improvement areas according to their peer's anonymous comments that the platoon trainer feels would benefit the candidate's leadership skill development.

**8-4. Warrior Tasks and Battle Drills.** WTBDs are tasks that were previously taught and tested in basic combat training. There is no requirement to re-teach these tasks in OCS. Candidates are expected to demonstrate task mastery through skill application. Documentation must exist to support the candidate's task mastery in each of the tasks in this module. Candidates receive 'GO' or 'NO GO' as a result of participating in the squad level refresher training. Refer to the WTBD verification sheet in Annex F for the specific documentation format. Every effort must be made to ensure adequate time is scheduled for this instruction.

**Chapter 9. LEADERSHIP ASSESSMENT PROGRAM/REQUIREMENTS**

9-1. **GENERAL.** This chapter provides the necessary guidance for employing the Leadership Assessment Program.

a. The primary purpose of OCS is to develop and assess leadership. Therefore, the primary focus of evaluation is directed towards assessing candidate performance in this area. While total objectivity can never be obtained, the use of standardized forms and definitions greatly enhances impartial leadership evaluations. Officer candidates must complete and be evaluated on a minimum of one leadership position for Phase I and Phase II. Phase III evaluations will be a minimum of one for the LRC and one for FLX II operations. It is highly recommended that commanders maximize OCs opportunity for evaluated leadership positions.

b. The USAIS developed the LAP for use in OCS. The program is implemented in a physically and mentally demanding environment. Its foundation is in FM 6-22. The candidate is evaluated on the Army Values and required actions, skills, and attributes as defined and described in FM 6-22.

c. The standard established in the LAP is the leadership performance expected of a second lieutenant. Candidates are evaluated on their ability to meet this established standard. Those who possess the actions, skills, and attributes necessary to become successful leaders are recommended for commissioning.

9-2. **Evaluation Tools.**

a. Leadership evaluation in OCS measures observed performance, not potential. OCS is structured to afford each candidate ample opportunity to perform and demonstrate their leadership capabilities while functioning as a member of the candidate chain of command. Candidates take on the various roles of leadership typically found in an Infantry company: commander, executive officer, first sergeant, platoon leader, platoon sergeant, and squad leader. While in these positions, candidates are expected to demonstrate the appropriate level of command presence and accomplish the duties and responsibilities of that role.

b. The OCS Leadership Assessment Program uses six forms that are used to record observations and form the basis for counseling:

(1) Leadership Evaluation In-Brief, ARNGOCS Form 2.

(2) Candidate Self-Assessment Report, ARNGOCS Form 4.

(3) Leadership Observation Report, ARNGOCS Form 3.

(4) Leadership Evaluation Report, ARNGOCS Form 1.

(5) Field Leadership Evaluation Report, ARNGOCS Form 5. Used only during short duration field evaluations such as evaluations of the tactical exercise without troops, and squad operations or platoon operations associated with FLX II.

(6) Leadership Reaction Course Report (LRCR) ARNGOCS Form 7. Used on evaluations for the leadership reaction course (LRC).

c. Definitions of ratings: Candidates are evaluated on the LER and FLER using a E-S-N scale. This scale and the formal evaluation process are used to introduce the process of formal evaluation to the officer candidate. This process readies the OCs for the officer evaluation reports that they receive as second lieutenants.

(1) The candidate receives an 'E' if she/he did an **excellent** job, consistently exceeded the standard of a BOLC A candidate, and demonstrated values, actions, skills and attributes of a newly commissioned second lieutenant. The candidate demonstrated the ability to operate independently outside of the company and battalion with limited guidance and supervision.

(2) The candidate receives an 'S' if she/he was **satisfactory** at demonstrating the values, actions, skills and attributes expected of an officer candidate. The candidate demonstrated the minimum standard.

(3) The candidate receives an 'N' if she/he demonstrated a **not satisfactory** performance, failed to meet the standard and did not demonstrate the values, actions skills and attributes expected of an officer candidate.

d. The LER or FLER assessment is purposely subjective. It relies on the platoon trainer's professional assessment. This subjectivity allows the platoon trainer to weight certain areas over others based on their experience and professional opinion of the observed behaviors. It is important to keep in mind that the candidate's demonstrated leadership performance is evaluated against the standard of a second lieutenant and not in comparison to his/her peers.

e. A candidate's LER or FLER scores are placed on the End of Course Summary. All LAP forms are then filed in the individual training record IAW Chapter 4, paragraph 4-2 of this CMP. These forms provide the documentation required to support confirmation of honors to the candidate, or to recommend the candidate for relief from OCS, or recycle. It is imperative that careful consideration and vigilance is taken when completing and maintainng all LAP forms.

**9-3. Leadership Counseling.** Candidates must be counseled on their performance at the completion of every leadership position assignment. The LER counseling session occurs within 24 duty hours of the completion of the leadership assignment in all phases. FLER counseling should occur within 6 hours of the completion of the leadership assignment when the FLER is used.

a. Initial counseling will be done within 72 hours of the start of Phase I, to include the expectations of the officer candidate, the Honor Code, review of the SEP, and review of academic and non-academic events. At the end of Phase II, an end of phase counseling will be done addressing the OCs progress, to include leadership, academics, peer evaluation ratings and physical fitness. See DA Form 4856 in Annex F.

b. LAP Packets: An LAP Packet for a leadership position for a LER will include:

- (1) Leadership Evaluation In-Brief.
- (2) At minimum 3 Leadership Observation Reports.
- (3) Candidate Self-Assessment.
- (4) Leadership Evaluation Report.

**Chapter 10. EXAMINATIONS**

10-1. **Examinations General.** One of the principal responsibilities of each candidate is to prepare for and to study the academic instruction presented in OCS. Academics are based on the program of instruction and designed to provide the candidate with an understanding of basic military skills, effective writing, problem analysis and the decision-making process, leadership, combat arms, combat support, combat service support, and the joint services operations required of a second lieutenant before attending BOLC B. Examinations are used to evaluate the OCs ability to grasp new material and measure his/her ability to retain this material. The examinations listed in Annex D of this CMP are mandatory for graduation from OCS. Each candidate must complete all examinations (no waivers). To pass an examination, candidates must achieve a score of at least 70%.

a. All exams and retests must be completed within the OCS phase assigned in Annex D of this CMP. No candidate is allowed to progress to the next phase of training until all phase requirements are met and all phase examinations are passed.

b. If a candidate fails an exam, he/she must receive remedial training IAW Chapter 7, paragraph 7-5 of this CMP before being retested. The candidate must be counseled on a DA Form 4856. An example of this counseling is found in Annex F. Candidates are allowed to retest one time on any examination. Candidates who pass the retest are awarded the minimum passing score (70%) regardless of the score they attain. The DA Form 4856, section IV, is completed annotating the candidate has passed or failed the retest. Actual retest scores must be recorded in the OCs records to establish his/her final proficiency level. To record actual retest scores and a passing 70% on the end of course summary, enter both the 70% and the actual retest score in the retest block for that examination (for example: 70/86). Retests are always scored as a 70% when computing candidate honors or for calculating honor platoon status for a given phase of OCS.

c. Candidates must take all examinations. If a candidate misses a scheduled exam, he/she must make arrangements to make it up as soon as possible at a time that does not conflict with other required OCS training. **The retest will be taken no later than 24 hours for accelerated and no later than one IDT for traditional.**

d. Retests are not make-up tests. Retests are required for all failed exams.

**Note:** The OCS Battalion/Regimental commander (during Phases I, III, accelerated OCS and accelerated Phase II) or OCS Battalion or GS Battalion/RTI commander (during Phase II - IDT) may, under exceptional circumstances, authorize one additional retest for candidates with significant leadership potential. Evidence supporting this claim must be filed in the candidate's packet. A memorandum for record from the company commander recommending an additional retest and stating the candidate's leadership potential must be included. This memorandum must be specific to the individual candidate.

e. **Candidates cannot fail more than three written exams. A third written exam failure will result in the candidate being put on academic probation. A fourth failure will result in a recommendation to the battalion commander for possible relief from the course. The candidate must be counseled on a DA 4856 of the consequences of the academic probation.**

10-2. **Test Control.** All examinations and test materials are FOR OFFICIAL USE ONLY and must be labeled as such. State OCS companies must protect this material IAW applicable TRADOC and Army regulations concerning test control. The individual state RTI commanders provide local test control procedures IAW applicable TRADOC and Army regulations concerning test control measures. The USAIS reviews and redesigns examinations and test materials periodically to maintain their effectiveness as tools to measure learning. See Annex B for test control regulations.



10-3. **Land Navigation Examination.** The land navigation exam consists of three distinct parts that are scored separately and then combined to form the candidate's overall land navigation score. The overall land navigation score is the only score counted when computing candidate honors status. The examinations are an individual candidate's responsibility. He/she must complete it without assistance from peers or cadre. Candidates failing any portion of this exam must receive remedial training before retesting.

a. Part one is a written examination conducted in a classroom environment. Officer candidates must receive a 70% passing grade to pass the examination.

b. Parts two (Day Land Navigation Exam) and three (Night Land Navigation Exam) are practical applications of skills learned and are conducted in a field training environment during Phase I using local maps. Every effort should be made by the OCS battalion to use a training site that has official Army maps available.

(1) The day component has a minimum of seven points, at least 500 meters apart, with a major direction change required at each point. Candidates must successfully locate a minimum of **five (5)** points to pass. Since five of seven points is a passing score it is scored as a 70% and serves as a baseline for the other possible scores for the day component of land navigation. Score the day land navigation as follows:

7 points out of a possible 7 = 100%.

6 points out of a possible 7 = 85%.

5 points out of a possible 7 = 70% Pass.

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4 points out of a possible 7 = 56% Fail.

3 points out of a possible 7 = 42%.

2 points out of a possible 7 = 28%.

1 point out of a possible 7 = 14%.

0 points out of a possible 7 = 0%.

**Note:** If the land navigation course has more than seven possible points, five points located is still a passing score and is scored as 70%. OCS programs with more than seven possible points must recompute the above scores, using five points at 70% as the baseline, to arrive at the other scores.

(2) The night component has a minimum of five points, at least 500 meters apart, with a major direction change required at each point. Candidates must successfully locate a minimum of **two (2)** points at night to pass. Since two of five points is a passing score, it is scored as a 70% and serves as a baseline for the other possible scores for the night component of land navigation. Score the night land navigation as follows:

5 points out of a possible 5 = 100%.

4 points out of a possible 5 = 90%.

3 points out of a possible 5 = 80%.

2 points out of a possible 5 = 70% Pass.

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1 point out of a possible 5 = 35% Fail.

0 points out of a possible 5 = 0%.

**Note:** If the land navigation course used has more than five possible points, two points located is still a passing score and is scored as 70%. OCS programs with more than five possible points must recompute the above scores, using two points at 70% as the baseline, to arrive at the other scores.

c. **Entering Land Navigation scores on the End of Course Summary.** Each portion of the land navigation exam counts for a third of the overall land navigation score. Therefore, enter the individual percentages in the appropriate box, average the three scores, and place that score in the overall land navigation score. Remember that any retest is scored as a 70% regardless of the score attained during the retest.

d. Land Navigation is an OCS Phase I training event. All training and exams are completed in Phase I. Candidates failing to achieve a 70% score in any portion of the land navigation exam will not graduate Phase I and will not proceed to Phase II training. The OCS battalion commander for Phase I (ADT and accelerated OCS) must schedule retest periods for OCS failures and retest.

## Chapter 11. DETERMINING CLASS HONORS

11-1. **General.** Officer candidates who excel during OCS deserve to be recognized for their efforts. This chapter explains in detail the process of selecting the honor graduates and class awards for each state. OCS awards other than the ones discussed are authorized and determined by each individual battalion or state.

11-2. **Determining Class Honors/Awards** Any system that awards honors must be devoid of any impropriety or any appearance of impropriety. To avoid this, the ARNG OCS program uses an objective system to determine each state OCS Honor graduate and the next two candidates that will graduate with honors. While the leadership evaluations are subjective and comprise a portion of an OCs score, collectively they are numbered evaluations, and when considered together create an objective opinion of that officer candidates leadership abilities as compared to his or her peers. There are three different Honor Awards given individually: the Distinguished Honor Graduate (who is the Erickson Trophy recipient), the second Honor Graduate, and the third Honor Graduate. There are three other awards given, the Academic Award, the Physical Fitness Award, and the Leadership Award.

11-3 **Components of the Honor Awards System.** Officer candidates receive honor awards based on their performance in four major areas of the course: Academics, APFT #2, leadership evaluations, and peer evaluations. Any candidate that failed any of the three major areas and had to retest, excluding leadership evaluations, will not be in the running for an honor award. A 'not satisfactory' on a leadership evaluation does not disqualify a candidate from being considered for honor awards.

a. **Academic.** There are 10 end-of-module exams given in Phases I and II of OCS. These exams are averaged for a total academic average (Note: Only the land navigation overall score is counted for honors). It is important to note that if a candidate failed any of the tests and had to retest, that retest will only count for 70%. The average of all 10 exams will be 25% of the total average for the honor awards system.

Example: OC Smith receives the following exam scores:

Overall Land Navigation Score	
(Average of written, day and night)	94%
Training Management	88%
Supervise Supply Activities	92%
Military Intelligence	96%
Call for Fire	80%
Leadership	100%
Military Justice	96%
Military History	84%
Tactics	92%
Operations	<u>96%</u>
<b>Overall Average</b>	<b>91.8%</b>

b. **APFT # 2.** A candidate can score a possible 300 points on the APFT # 2 (no extended scale allowed). If an officer candidate fails APFT # 2, requires a retest, and passes the retest, they are not eligible for the honors award. The actual score is still entered on the end of course summary but is not used to compute honors. APFT #2 will be 25% of the total average for the honor awards system. In order to compute the APFT for the honors award, the APFT must be divided by three for a percentage.

Example: An APFT score of 297 will be computed as follows:

$$297/3 = 99\%$$

c. **Leadership Evaluations.** Officer candidates must receive at least one leadership position per phase. Some receive more positions (in a smaller class) and some receive fewer (in the case of a large class). Since a candidate receives an average on their leadership positions, how many they received is not a discriminating factor when computing for the honor award. With the new rating system using E for Excellent, S for Satisfactory and N for Not Satisfactory, each rating must also count for a percentage: E is 100%; S is 85% and N is 69%. All rated leadership evaluations will be added to their percentage and then averaged according to how many evaluations they received. Leadership evaluations are 30% of the total average for the honor awards system.

Example: OC Smith has the following evaluations: N, S, S, S, E, S, and E

	N = 69%
	S = 85%
	S = 85%
	S = 85%
	E = 100%
	S = 85%
	E = <u>100%</u>
Total	609

For the average, divide 609 by 7 (for total number of evaluations), which would equal an average of **87%**.

d. **Peer Evaluations.** Peer evaluations are the last 20% of the honors award system. Peer evaluations can either be done as a classroom (usually two squads per classroom) or as an entire platoon. The evaluations are based on the ranking within their group. The candidate's percentages (for their 20% peer evaluation portion of the honor awards system) will be computed by using two percentage point increments.

Example:

NAME	RANKING	PERCENTAGE
OC Randolph	1	100%
OC Jones	2	98%
OC Williams	3	96%
OC Smith	4	94%
OC Goodwin	5	92%
OC O'Brian	6	90%
OC Delta	7	88%
OC Jack	8	86%
OC Charlie	9	84%

11-4. **The Honor Graduate and those Graduating with Honors.** Once the four areas of the honors award system have been compiled, those four percentages will then be multiplied by their specific percentage and those numbers will be added together for an overall percentage.

Example: OC Smith percentages for the four areas:	Academic average	91.8%	x 25%
	APFT #2	99%	x 25%
	Leadership Evaluations	87%	x 30%
	Peer Evaluations	<u>94%</u>	x 20%
	<b>Overall Average</b>	<b>92.6%</b>	

Once the overall averages are computed and the class is rank ordered, determining class honors is effortless for the state OCS company commanders. The first ranking receives the distinguished honor graduate, and the second and third ranking receive second honor graduate and third honor graduate accordingly. The following awards are awarded at the graduation/commissioning ceremony. Awards other than these are authorized and determined by each individual battalion or state.

11-5. **Determining Class Awards other than Honor.** As listed in paragraph 11-2 above, there are three awards other than the honor awards. These are the academic, physical fitness, and leadership awards.

a. **Academic.** There are ten end-of-module exams given in Phases I and II of OCS. These exams are averaged for a total academic average (Note: Only the land navigation overall score is counted for the academic award. If a candidate failed any of the tests and had to retest, then that candidate will not be considered for the academic award.) The average of all ten exams will be the determination for the academic award. Failure in any other event (APFT, foot march, leadership evaluation) does not disqualify a candidate from being eligible for consideration for the academic award.

Example: OC Smith receives the following exam scores:

Overall Land Navigation score	
(Average of written, day and night)	94%
Training Management	88%
Supervise Supply Activities	92%
Military Intelligence	96%
Call for Fire	80%
Leadership	100%
Military Justice	96%
Military History	84%
Tactics	92%
Operations	96%
<b>Overall Average</b>	<b>91.8%</b>

b. **Physical Fitness Award.** In determining the physical fitness award winner, the overall average of APFTs taken throughout the course will be considered, and the APFT extended scale will be used. A candidate who fails an APFT, and has to re-test in any of the three foot marches or the three mile release runs will not be considered for the physical fitness award.

c. **Leadership Award.** Officer candidates must receive at least one leadership position per phase. Since a candidate receives an average on their leadership positions, how many they received is not a discriminating factor when computing for the leadership award. With the new rating system using E for Excellent, S for Satisfactory and N for Not Satisfactory, each rating must also count for a percentage. E is 100%; S is 85% and N is 69%. All rated leadership evaluations will be added to their percentage and then averaged according to how many evaluations there were. The candidate with the highest average is the leadership award winner.

Example: OC Smith has the following evaluations: N, S, S, S, E, S, and E

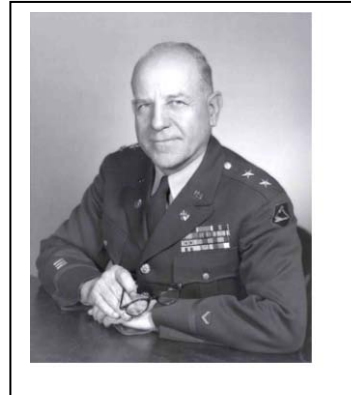
	N = 69%
	S = 85%
	S = 85%
	S = 85%
	E = 100%
	S = 85%
	E = <u>100%</u>
Total	609

For the average, divide 609 by 7 (for total number of evaluations), which would equal an average of **87%**.

d. **Other Awards Determined by Each Battalion or State:** The following space is provided for each battalion or state to place additional awards or recognition for officer candidates.

**11-6 Erickson Trophy Recipient/Distinguished Honor Graduate.** This award is given to the top candidate in each state OCS class. Status is determined using the honors award system described in paragraph 11-3 above. This award is presented by the authority of the Department of the Army and the Air Force, National Guard Bureau and signifies distinguished leadership and academic ability.

The award is named for MG Edgar C. Erickson, who enlisted in the Massachusetts National Guard in April 1914 and served on the Mexican Border in 1916. He was commissioned a second lieutenant in 1917 and served with the 26th Division in France, 1917-18 and subsequently served as the Adjutant General of Massachusetts (1939-1942). He was called into Federal service from 1940-1942 as the State Director, Selective Service, Massachusetts. He accepted a demotion to the rank of Colonel in 1942 to go on active service in the Infantry. General Erickson was later assigned as a liaison officer with the Chinese Nationalist Army for the remainder of the Second World War. His career culminated with his assignment as Chief, NGB from 22 June 1953 to 31 May 1959.



The following verbiage accompanies the presentation of this award:

**Department of the Army and the Air Force  
National Guard Bureau**

The Erickson Trophy is Presented to

Article I. (Name of Officer Candidate)

For Distinguished Leadership and Academic Ability

The Erickson Trophy is a replica of the 'Sons of Liberty' Bowl which was designed and executed by Paul Revere. The original bowl is a symbol of our National freedom inasmuch as it commemorates the determined stand for liberty made by the colonists of this country, years before the Declaration of Independence. Fifteen members of an organization of patriots in Massachusetts, called the 'Sons of Liberty', commissioned Paul Revere to design and make this bowl in tribute to the members of the Massachusetts Bay House of Representatives who defied the King's order to rescind their resolution which authorized a circular letter to be sent all the other colonies, calling upon them to unite in protest against taxation without representation. This was in the year 1768, seven years before the Revolution. It was during a time of peace that these men staked their lives for a principle. Their courageous stand was a definite first step toward independence of the colonies and subsequent formation of the United States of America.

Since the National Guard traces its history back through this period of time, it was felt that the 'Sons of Liberty' Bowl would be most appropriate and would also most suitably honor the man who did so much for the National Guard and the establishment of the State Officer Candidate Schools. Major General Edgar C. Erickson, Chief of the National Guard from 22 June 1953 to 31 May 1959, himself a former Adjutant General of Massachusetts.

**Chapter 12 GRADUATION REQUIREMENTS/PHASE**

12-1. **General.** Several officer candidate requirements per phase are discussed throughout this CMP. This chapter details these requirements by phase. This chapter is created for the quick reference of the user and is not a complete and comprehensive list of all officer candidate requirements. It is incumbent on the chain of command to be fully aware of all requirements listed in this CMP and applicable regulations.

**12-2 Phase Completion/Graduation Requirements.****a. Pre OCS.**

(1) APFT # 1 – Must pass standard APFT IAW TC 3-22.20 within 60 days of (and prior to day one of) Phase I training.

(2) Course prerequisites – Must provide all required documentation to confirm candidate meets course prerequisites prior to the start of Phase I. Documents must be organized in the candidate record IAW Chapter 4 of this CMP prior to arrival at Phase I training.

**b. Phase I.** The following events must be successfully completed prior to the end of Phase I:

(1) Five-mile foot march–Must complete five-mile foot march without assistance within 1 hour and 45 minutes.

(2) Peer evaluation # 1 – Must complete peer evaluation # 1. See Chapter 8-3 for details concerning peer evaluations.

(3) POI Training – Must attend or makeup all Phase I POI training as outlined in Annex D of this CMP.

(4) Examinations – Must pass all four Phase I exams or retests as outlined in Annex D of this CMP. Candidate must score 70% or greater on each exam. Phase I exams include: Training Management, Map Reading Written, Land Navigation Day Practical, and Land Navigation Night Practical. All exams and retests must be completed prior to the end of Phase I.

(5) Leadership Evaluation Report – Must receive and complete a minimum of one leadership position evaluation during Phase I. See Chapter 9 of this CMP for details concerning the Leadership Assessment Program.

(6) WTBD – Candidates must instruct at least one of the WTBDs and demonstrate task mastery through skill application of all WTBDs. Candidates must receive a ‘Go’ on all WTBDs and have documented evidence of task mastery on each task. See WTBD verification sheet in Annex F.

(7) Must be recommended by the OCS company commander (by signature on End of Course Summary Sheet Phase I) as possessing the ability to acquire the leadership skills, attitudes and knowledge required of a second lieutenant prior to graduating Phase I training and beginning Phase II training.

**c. Phase II.** The following events must be successfully completed prior to the end of Phase II:

(1) Peer evaluation # 2–Must complete peer evaluation # 2. See Chapter 8-3 for details concerning peer evaluations.

(2) POI Training – Must attend or makeup all Phase II POI training as outlined in Annex D of this CMP.

(3) Examinations–Must pass all eight Phase II written exams or retests as outlined in Annex D of this CMP. Candidate must score 70% or greater on each exam. Phase II exams include: Operations, Tactics, Call for Fire, Leadership, Military Justice, Heritage and History, Supply Activities and Elements of Military Intelligence. All exams and retests must be completed prior to the end of Phase II.

(4) Peer evaluation # 3–Must complete peer evaluation # 3. See Chapter 8-3 for details concerning peer evaluations.

(5) Seven-mile foot march–Must complete the seven mile foot march without assistance within 2 hours and 30 minutes. Uniform must be IAW instructions concerning the seven-mile foot march contained in Chapter 8 of this CMP.

(6) Ten-mile foot march–Must complete the ten-mile foot march without assistance within 3 hours and 30 minutes. Uniform must be IAW instructions concerning the ten-mile foot march contained in Chapter 8 of this CMP.

(7) APFT # 2 – Traditional OCS Phase II candidate's must pass a standard APFT within 60 days of Phase III start date. Accelerated OCS Phase II candidate's must be prior to and within 20 days of Phase III start date. No alternate events are authorized per AR 350-1.

(8) Three Mile Release Run–Must complete a three mile release run without assistance and in the designated time standard. MALE time standard is 27:00 (or 9:00 per mile). FEMALE time standard is 29:15 (or 9:45 per mile). A candidate who fails to meet the standard will be given one retest.

(9) Leadership Evaluation Report – Must receive and complete a minimum of one leadership position evaluation during Phase II. **Candidate must attain an 'E' or an 'S' to proceed to Phase III.**

(10) Must be recommended by the OCS company commander (by signature on the end of course summary sheet Phase II) as possessing the ability to acquire the leadership skills, attitudes and knowledge required of a second lieutenant prior to graduating Phase II training and beginning Phase III training.

d. **Phase III.** The following events must be successfully completed prior to the end of Phase III.

(1) Combat Water Survival Test – Must attempt the Combat Water Survival Test IAW Chapter 8 of this CMP.

(2) Obstacle Course. Must conduct obstacle course training, either conditioning or confidence type, and make a valid attempt at each obstacle on the course. See Chapter 8 for details concerning obstacle course.

(3) POI Training – Must attend all Phase III POI training as outlined in Annex D of this CMP.

(4) Leadership Reaction Course (LRC) – Must participate as a squad member and as a squad leader at LRC training. Candidates will be evaluated with the LRCR.

(5) Field Leadership Exercise II – A candidate will be evaluated on leadership during FLX II with the FLER. **Candidate must attain an 'E' or an 'S' on their FLX II operations evaluation to graduate Phase III.**

(6) Must be recommended by the OCS Company Commander (by signature on End of Course Summary Sheet Phase III) as possessing the leadership skills, attitudes and knowledge required of a second lieutenant prior to graduating Phase III and OCS.



**Annex A. TERMS USED IN OCS.**

ABIC	Army Basic Instructor Course.
Accreditation	Initiative to certify Army training institutions teaching TRADOC approved courses.
ACU	Army combat uniform.
ADT	Active duty training.
ANCOC	Advanced noncommissioned officer course.
ARNG-TRI	National Guard Bureau Operations, Army Readiness and Training Directorate.
AOCS	Accelerated Officer Candidate School; an eight week program for training officer candidates at an accelerated pace.
APFT	Army Physical Fitness Test.
ATRRS	Army Training Requirements and Resource System.
ATSC	Army Training and Support Center.
BOLC A	Basic Officer Leadership Course A; a pre-commissioning education that candidates/cadets receive prior to commissioning as second lieutenants.
BOLC B	Basic Officer Leadership Course B (formerly known as (BOLC III); a course conducted by a proponent school that provides training on platoon-level, branch specific technical and tactical skills. Successful completion of the course results in a branch specific occupational specialty.
Cadre	The personnel charged with the administration and conduct of the OCS program.
CMP	Course Management Plan.
Common Core	TRADOC-directed/approved tasks required to be taught in all Army training institutions regardless of career field.
CWST	Combat water survival test.
DA	Department of the Army.
DOR	Date of rank.
Evaluation	The process of interpreting the results of an assessment with the purpose of determining the effectiveness of the program. An external evaluation is planned, resourced, and conducted by a headquarters at an echelon higher in the chain of command than the organization undergoing the evaluation. An internal evaluation is planned, resourced, and conducted by the organization undergoing the evaluation.
FLER	Field Leadership Evaluation Report.
FLX	Field Leadership Exercise.

Go/No go	A pass-fail rating used to evaluate the level of candidate proficiency and task mastery.
Guest instructor/platoon trainer	A primary or assistant instructor/platoon trainer officer/NCO not on the OCS battalion/company TDA and/or unit manning roster.
IAW	In accordance with.
Instructor certification	Qualification of a Soldier enabling him/her to teach in OCS. Criteria for certification is based on previous training, current teaching techniques, and familiarity with the subject matter.
LAP	Leadership Assessment Program.
LER	Leadership Evaluation Report.
LOR	Leadership Observation Report; an LAP tool used to evaluate an officer candidate's demonstrated leadership performance while in a leadership role.
LRC	Leadership Reaction Course.
LRCR	Leadership Reaction Course Report.
NGB	National Guard Bureau.
OC	Officer Candidate.
OCS	Officer Candidate School.
PHA	Periodic Health Assessment
Platoon trainer	Primary instructor in the OCS environment that focuses on candidate leadership development through continuous assessment and evaluation.
POI	Program of instruction.
RTI	Regional Training Institute. The command and control element within each state/territory that oversees and supports the conduct of OCS training.
SMCT	Soldiers Manual of Common Tasks.
SME	Subject matter expert; the state RTI identified by NGB as the SME of the National Guard OCS program. The SME is the liaison between OCS battalions and NGB/federal OCS proponents.
PTQC	Platoon Trainer Qualification Course.
SEP	Student Evaluation Plan.
SOP	Standard operating procedure.
TAITC	Total Army Instructor Training Course.

TASS	The Army School System; The regional concept and geographical division of the Army National Guard and Army Reserve training organization. The execution of TASS promotes a coordinated effort in resourcing and conducting Army schools at locations other than the proponent school.
TCC	Tactical Certification Course
TLO	Terminal learning objective.
TRADOC (TR)	United States Army Training and Doctrine Command.
TSP	Training support package.
USAIS	United States Army Infantry School.
WTBD	Warrior Task and Battle Drills.
YTP/YTC	Yearly training plan/yearly training calendar.

**Annex B. LEARNING CENTER REFERENCES**

B-1. References identified in this appendix must be available for use by OCS instructors and candidates. Because of the rising cost of publications, it is authorized to maintain current regulations on CDs, however, you must maintain one hard copy of each regulation in the library. The regulations need to be identified on the CDs and marked UNCLASSIFIED FOUO. Each school code must create a learning center and maintain a library where instructors may go to prepare their lessons and students may go to research a problem or find regulatory guidance. Each school code develops an individual library management plan. This appendix identifies the titles of the publications required to be on-hand in support of all OCS POI training.

B-2. Army Publication Web Sites. Every effort must be made by the OCS cadre to ensure that their teaching material and references are the most current available. The Army hosts several sites where OCS cadre can acquire the latest publications to ensure quality and current instruction. The following sites contain the preponderance of the Army's publications:

USAPA at: [www.usapa.army.mil](http://www.usapa.army.mil)

Army Knowledge Online (AKO) at: [www.us.army.mil/portal/](http://www.us.army.mil/portal/)

General Dennis J. Reimer Training and Doctrine Digital Library: [www.adtdl.army.mil](http://www.adtdl.army.mil)

B-3. Maintain only the most recent edition of each publication. Destroy outdated publications.

**Allied Communication Publication**

125 (F)            *Communication Instructions Radiotelephone Procedures*

**Army Regulation**

5-13            *Total Army Munitions Requirements Process and Prioritization System*

15-6            *Procedures for Investigating Officers and Boards of Officers*

25-30            *The Army Publishing Program.*

25-50            *Preparing and Managing Correspondence*

25-400-2        *The Army Record Information Management System (ARIMS)*

27-3            *The Army Legal Assistance Program*

27-10            *Military Justice*

40-5            *Preventive Medicine*

40-501          *Standards of Medical Fitness*

140-50          *Officer Candidate School, Army Reserve*

140-111        *U.S. Army Reserve Reenlistment Program*

190-13          *The Army Physical Security Program*

190-51          *Security of Unclassified Army Property*

350-1           *Army Training and Leader Development*

350-10          *Management of Army Individual Training Requirements and Resources*

380-5           *Department of the Army Information Security Program*

385-10          *The Army Safety Program*

385-63          *Range Safety*

600-3           *The Army Personnel Development System*

600-8-2        *Suspension of Favorable Personnel Actions (FLAGS)*

600-8-24       *Officer Transfer and Discharges*

600-9	<i>The Army Weight Control Program</i>
600-20	<i>Army Command Policy</i>
600-25	<i>Salutes, Honors and Visits of Courtesy</i>
600-100	<i>Army Leadership</i>
601-280	<i>Army Retention Program</i>
614-100	<i>Officer Assignment Policies, Details and Transfers</i>
614-185	<i>Requisitions and Assignment Instructions for Officers</i>
623-3	<i>Evaluation Reporting System</i>
635-200	<i>Active Duty Enlisted Administrative Separation</i>
670-1	<i>Wear and Appearance of Army Uniforms and Insignia</i>
735-5	<i>Policies and Procedures for Property Accountability</i>

**Department of the Army Pamphlet**

27-1	<i>Treaties Governing Land Warfare</i>
190-51	<i>Risk Analysis for Army Property</i>
350-9	<i>Index and Description of Army Training Devices</i>
350-38	<i>Standards in Weapon Training</i>
385-1	<i>Small Unit Safety Officer/NCO Guide</i>
360-512	<i>Code of the U.S. Fighting Force.</i>
600-3	<i>Commissioned Officer Development and Career Management</i>
600-25	<i>U.S. Army Noncommissioned Officer Professional Development Guide</i>
600-67	<i>Effective Writing for Army Leaders</i>
611-21	<i>Military Occupational Classification and Structure</i>
623-3	<i>The Noncommissioned Officer Evaluation Reporting System</i>
710-2-1	<i>Using Unit Supply System (Manual Procedures</i>
750-8	<i>The Army Maintenance Management System (TAMMS) Users Manual</i>

**Field Manual**

1	<i>The Army</i>
1-0	<i>Human Resources Support</i>
1-02	<i>Operational Terms and Graphics.</i>
2-0	<i>Intelligence</i>
3-0	<i>Operations</i>
3-01.80	<i>Visual Aircraft Recognition</i>
3-07	<i>Stability Operations</i>
3-6	<i>Field Behavior of NBC Agents (Including Smoke and Incendiaries)</i>
3-11	<i>Multiservice Tactics, Technique, and Procedures for Nuclear, Biological and Chemical Defense Operations</i>
3-11.3	<i>Multiservice Tactics, Technique, and Procedures for Chemical, Biological Radiological and Nuclear Contamination Avoidance</i>
3-11.4	<i>Multiservice Tactics, Technique, and Procedures for Nuclear, Biological and Chemical (NBC) Protection</i>
3-11.5	<i>Multiservice Tactics, Technique, and Procedures for Chemical, Biological, Radiological, and Nuclear Decontamination</i>

3-19.15	<i>Civil Disturbance Operations</i>
3-21.5	<i>Drill and Ceremonies</i>
3-21.8	<i>The Infantry Rifle Platoon and Squad</i>
3-21.10	<i>The Infantry Rifle Company</i>
3-21.75	<i>The Warrior Ethos and Soldier Combat Skills</i>
3-22.68	<i>Crew-served Machineguns, 5.56 MM &amp; 7.62 MM.</i>
3-22.9	<i>Rifle Marksmanship M16-/M4- Series</i>
3-25.26	<i>Map Reading and Land Navigation</i>
3-25.150	<i>Combatives</i>
3-34	<i>Engineer Operations</i>
3-34.214	<i>Explosives and Demolitions</i>
3-25.26	<i>Map Reading and Land Navigation</i>
3-50.3	<i>Survival, Evasion and Recovery, Multiservice Tactics, Techniques and Procedures</i>
4-0	<i>Sustainment</i>
5-0	<i>The Operations Process</i>
5-19	<i>Composite Risk Management</i>
5-34	<i>Engineer Field Data</i>
5-102	<i>Countermobility</i>
5-103	<i>Survivability</i>
6-22	<i>Army Leadership</i>
6-30	<i>Tactics, Techniques and Procedures for Observed Fire</i>
7-0	<i>Training For Full Spectrum Operations</i>
19-10	<i>Military Police Law and Order Operations</i>
20-3	<i>Camouflage, Concealment, and Decoys</i>
21-10	<i>Field Hygiene and Sanitation</i>
21-18	<i>Foot Marches</i>
21-60	<i>Visual Signals</i>
22-51	<i>Leaders' Manual for Combat Stress Control</i>
23-23	<i>Antipersonnel Mine M18A1 and M18 (Claymore)</i>
24-18	<i>Tactical Single Channel Radio Communications Techniques</i>
27-1	<i>Legal Guide for Commanders</i>
27-10	<i>The Law of Land Warfare</i>

**Miscellaneous**

DOD 5500.7	<i>Standards of Conduct</i>
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**Soldiers Training Publications**

STP 21-1-SMCT	<i>Soldier's Manual of Common Tasks</i>
STP 21-24-SMCT	<i>Soldier's Manual of Common Tasks</i>

**Training Circulars**

TC 3-10            *Commander's Tactical NBC Handbook*  
TC 3-22.20       *Army Physical Readiness Training*  
TC 24-20        *Tactical Wire and Cable Techniques.*

**Training Manuals**

3-4240-279-10            *Operator's Manual: Mask Chem-Bio; Field ABC-M17.*  
3-6665-307-10            *Operator's Manual: Detector Kit, Chem Agent: M256/A1.*  
9-1005-313-10            *Operator's Manual for Machine Gun, M240B.*  
9-1005-249-10            *Operator's Manual for Rifle, 5.56-MM, M16.*  
11-5820-890-10-8        *SINGARS Operations.*

**National Guard Bureau Publications**

NGR 600-100            *Commission Officers – Federal Recognition and Related Personnel Actions*  
NGR 600-200            *Enlisted Personnel Management*  
NGB PAM 351-1        *The Army School System (TASS).*

**Training and Doctrine Command (TRADOC)**

TRADOC Reg 350-8    *Ammunition*  
TRADOC Reg 350-18   *The Army School System (TASS)*  
TRADOC Reg 350-70   *Systems Approach to Training Management, Processes and Products*  
*TRADOC Mobilization and Operations Planning and Execution System (TMOPES).*

**Test Control Regulations**

AR 611-5                *Personnel and Classification Testing*  
AR 380-5                *Department of the Army Information Security Program*  
TRADOC PAM 350-70-4   *Systems Approach to Training: Evaluation.*  
TRADOC PAM 350-70-5   *Systems Approach to Training: Testing.*

B-4.To requisition regulations, field manuals, technical manuals, Soldiers training publications, use the 'pinpoint' distribution process. The United States Army Publications-Distribution Center in St. Louis, MO, processes all of these requests. Until complete automation occurs, school codes can continue to order publications using DA Form 4569. Each state/territory has an account number against which school codes may order publications.

<p><b>Note:</b> TR No. ASQB 93124 contains specific guidance regarding the ordering process that is undergoing complete automation under DDN (Direct Distribution Network).</p>
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**Annex C. CANDIDATE REFERENCES**

C-1. References identified in this appendix are for the candidates to use while enrolled in OCS. Issue one copy of each reference to each candidate at the beginning of the course and recover them when the candidate graduates or disenrolls from the course. All publications are recoverable and are reissued with each new class.

C-2. Because of the rising cost of publications and the necessity to keep costs down, only essential publications are identified as 'whole' issue items. TSPs contain publication extracts as required by the subject matter discussed. There is no longer a need for candidates to stock pile reference materials. In addition, each school code maintains a library/learning center where students may research a problem or find regulatory guidance. This library reduces the requirement for candidates to draw large numbers of reference materials that do not require frequent use.

C-3. Reference materials identified in this appendix are dated. Ensure that only the most recent edition of each publication is issued to the candidate. Outdated publications should be destroyed. It is the responsibility of the unit conducting each phase of training to issue the publications needed to the candidates on site. Officer candidates do not travel with reference material. This rule of issue applies to all OCS documents except the Officer Candidate Guide, which is printed and issued by the OCs home state during Phase 0.

**Army Regulations**

25-50	<i>Preparing and Managing Correspondence</i>
670-1	<i>Wear and Appearance of Army Uniforms and Insignia</i>

**Field Manuals**

1	<i>The Army</i>
1-02	<i>Operational Terms and Graphics</i>
3-0	<i>Operations</i>
3-21.5	<i>Drill and Ceremonies</i>
3-21.8	<i>The Infantry Rifle Platoon and Squad</i>
3-21.10	<i>The Infantry Rifle Company</i>
3-25.26	<i>Map Reading and Land Navigation</i>
5-0	<i>Army Planning and Orders Production</i>
5-19	<i>Composite Risk Management</i>
6-22	<i>Army Leadership</i>

**Graphic Training Aids**

05-02-012	<i>Coordinate Scale and Protractor.</i>
07-01-038	<i>Infantry Leaders Reference Card.</i>
17-02-015	<i>The Call for Fire.</i>
DA Form 7566	<i>Composite Risk Assessment Worksheet.</i>

**Miscellaneous**

*Officer Candidate Guide.*



**Soldier Training Publications**

STP 21-1-SMCT	<i>Soldier's Manual of Common Tasks</i>
STP 21-24-SMCT	<i>Soldier's Manual of Common Tasks</i>

**Training Circular**

TC 3-22.20	<i>Army Physical Readiness Training</i>
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**Military Maps**

V745X40484	<i>Columbus, Ga. 1973.</i>
V791X14774	<i>Tenino, Wash. 1975.</i>
	<i>Local training area.</i>

<b>USAIS Publications</b>	<i>OCS Student Guide.</i>
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**ARTEP**

7-1-D	<i>Warrior Battle Drills</i>
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C-4. When requisitioning regulations, field manuals, technical manuals, or Soldier training publications, use the 'pinpoint' distribution process. The United States Army Publications-Distribution Center in St. Louis, Mo., processes all of these requests. Until complete automation occurs, school codes can continue to order publications using DA Form 4569. Each state/territory has an account number against which school codes may order publications.

<b>Note:</b> TR No. ASQB 93124 contains specific guidance regarding the ordering process that is undergoing complete automation under DDN (Direct Distribution Network).
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C-5. When requisitioning graphic training aids, order directly through the local TASC.

C-6. When requisitioning maps, order through the Defense Mapping Agency, telephone numbers: (301) 227-2495 or (800) 826-0342. Be sure to reference the specific course and use the stock number listed in the matrix above. Orders may be sent to: DMA Consumer Interface Division; Stop D12, ATTN: OCIJ; 4600 Sangamore Road; Bethesda, Md., 20816-5003.

**Annex D. ACADEMICS**

**D-1. Overview.** The OCS POI contains 13 instructional modules. These modules and the lessons which comprise them, the recommended training hours, and the TSPs required to support them are detailed in this chapter. This chapter also contains information pertaining to required and recommended instructional sequencing and identifies the lessons required in each phase. It is important to remember that the listed required time is only relevant for planning the training event. During the actual conduct of training, instructors may use more or less time depending on the demonstrated proficiency of the candidates. The program of instruction is developed using optimum times to project supporting resources: facilities, equipment, training areas, transportation, and instructor contact hours. Time is not rigid as long as the action, conditions, and standards in the TLO are met. However, the training schedule and the commander's YTP/YTC must reflect at least the minimum training time established in this chapter.

**D-2. Instructional Modules and Support.** The modules and lessons are listed below. Teach lessons within the specified phase. Do not shift lessons from one phase to another. The OCS TASS battalion does not have the authority to move a lesson out of the prescribed phase without an exception to policy granted by USAIS. All training will be progressive and sequential, which occurs when tasks in the same general subject matter are taught from junior to senior training levels. The training represents increasing levels of supervisory responsibility as the tasks become more involved, especially when tasks in the same general subject matter are ordered simple to complex and are taught beginning with the least difficult task.

**D-3. Explanation of the Module/Lesson Numbering System**

A. TRADOC prescribes a particular numbering system for TSPs, which applies to all proponent schools. The OCS Company Commander must teach the lesson in the phase prescribed by this CMP/POI.

B. Figure 12-1 explains the meaning of the numbering system used in the ARNG OCS POI. Figure 12-1 describes the module number for Reading Diagnostics. 071F1755.

<b>071</b>	Identifies USAIS as the proponent school.
<b>F</b>	Identifies Army National Guard.
<b>1755</b>	Identifies Lesson Number.

**Figure 12-1. TSP numbering system.**

**TASS ARNG OCS**  
**D-4. Lessons Taught by Phase**

**01 May 2011**

<b>PHASE I</b>		
<b>Lesson Number</b>	<b>Lesson Title</b>	<b>Hours</b>
<b>MODULE -A – ADMINISTRATIVE:</b>		
071F6835	First Sergeant Briefing	0.5
071F6836	Company Commander Orientation	0.5
071F6837	Senior Platoon Trainer Briefing	0.5
071F6838	Platoon Trainer Briefing	0.5
071F6840	Personnel Processing and Pre-commission Orientation	3.5
071F6842	OCSOP Orientation	1.0
071F6845	Battalion Commander Welcome	0.5
071F6846	Honor Code Orientation	1.0
071F6847	Initial Platoon Trainer Interview	2.5
071F6853	Standards for Inspection	2.0
071F6855	Class Opening	1.0
071F6872	Peer Performance Rating (Phase I)	4.0
071F6877	Chain of Command & Performance Counseling (PH I)	15.0
071F6916	End of Phase Critique	1.0
071F6959	Study Hall	12.0
<b>MODULE -B – GENERAL SUBJECTS &amp; REQUIRED TRAINING:</b>		
071F6854	Establish an Individual Fitness Program	3.0
071F6904	Introduction to Drill and Individual Drill / D&C	4.5
071F9007	Battlemind Training	1.5
071F8338	Cultural Awareness	3.0
<b>MODULE -C – PHYSICAL TRAINING EVENTS :</b>		
071F6843	Physical Training (Phase I)	8.0
071F6857	5- Mile Foot March	2.0
<b>MODULE -D – LAND NAVIGATION &amp; BASIC SOLDIER SKILLS AND FIELD CRAFT:</b>		
071F6864	Land Navigation Train-up	36.0
071F6921	Warrior Tasks and Battle Drills-Phase I (WTBD-1)	24.0
071F6966	Applied Map Reading Exam	1.0
071F6968	Applied Map Reading	7.0
071F6971	Land Navigation Diagnostic (Individual)	8.0
071F6974	Land Navigation Exam (Day and Night)	8.0
<b>MODULE- E – THE ARMY TRAINING MANAGEMENT SYSTEM:</b>		
071F1090	The Army Training Management System	5.0
071F1091	The Army Training Management System Exam	1.0
071F6962	Composite Risk Management	2.0
<b>MODULE- F - LEADERSHIP</b>		
071F1394	Soldier Team Development	4.0
<b>MODULE -G - TACTICS</b>		
071F1079	Introduction to Combat Orders	1.0
071F1081	Troop Leading Procedures (OCS)	4.0
<b>TOTAL PHASE I HOURS</b>		<b>168.5</b>

<b>PHASE II</b>		
<b>Lesson Number</b>	<b>Lesson Title</b>	<b>Hours</b>
<b>MODULE -A – ADMINISTRATIVE:</b>		
071F6871	Peer Performance Rating Counseling (Phase II)	3.0
071F6877	Chain of Command & Performance Counseling	15.0
071F6881	Command Inspection (Phase II)	3.0
071F6884	Officer Branch Briefing	3.0
071F6887	Dining In (Optional)	0
071F6895	End of Phase Counseling	2.0
071F6915	Conduct an After Action Review (AAR)	1.0
071F6916	End of Phase Critique	1.0
071F6959	Study Hall	15.0
<b>MODULE -B – GENERAL SUBJECTS &amp; REQUIRED TRAINING:</b>		
071F6888	Army's Sexual Assault Prevention & Response Training	2.0
071F6907	Develop a Platoon/Company Combatives Program	3.0
071F6938	Prevention of Sexual Harassment (POSH)	2.0
071F9001	JPME	1.5
071F9004	Supervise Detainee Operations	2.5
071F9005	Rehearsals	3.0
071F9006	OER Systems	1.5
<b>MODULE -C –PHYSICAL TRAINING EVENTS:</b>		
071F6839	Army Physical Fitness Test (APFT)	2.5
071F6844	Physical Training (Phase II)	18.0
071F6873	7- Mile Foot March	3.0
071F6908	10 -Mile Foot March	4.0
071F6935	3-Mile Release Run	1.0
<b>MODULE -D – FIELD LEADERSHIP/BASIC SOLDIER SKILLS AND CRAFT:</b>		
071F1717	Communicate by Tactical Radio	3.0
071F6868	FLX 1	48.0
071F6927	Warrior Tasks and Battle Drills – Phase II (WTBD-2)	16.0
<b>MODULE -E – HERITAGE AND HISTORY:</b>		
071F1776	Military History	6.0
071F1777	Military History Exam	1.0
071F6861	Heritage of Officer Candidate School (OCS)	1.0
071F6862	The Role of the NCO/Officer and Warrant Officer	2.0
<b>MODULE- F – ELEMENTS OF MILITARY INTELLIGENCE (MI):</b>		
071F1311	Elements of Military Intelligence (MI)	4.0
071F1312	Elements of Military Intelligence (MI) Exam	1.0
<b>MODULE-G- CALL FOR FIRE:</b>		
071F1627	Call for Fire	3.5
071F1628	Call for Fire Exam	1.0
<b>MODULE-H – SUPPLY ACTIVITIES:</b>		
071F1157	Supervise Supply Activities	2.5
071F1158	Supervise Supply Activities Exam	1.0

<b>Phase II (Continued)</b>		
<b>Lesson Number</b>	<b>Lesson Title</b>	<b>Hours</b>
<b>MODULE-I – OPERATIONS:</b>		
071F1086	Graphic Representation	2.0
071F1087	The Platoon Operation Order	6.0
071F1088	Staff Organization	1.0
071F1089	Operations Exam	1.0
071F6860	U.S. Army Organization	1.5
<b>MODULE-J – TACTICS:</b>		
071F1080	Principals of the Defense	2.0
071F1082	Introduction to Army Operations and Principals of War	2.5
071F1084	OCS Tactics Exam	1.0
071F6850	MG Theory	2.0
071F6865	Principals of Offense	2.0
<b>MODULE-K – MILITARY JUSTICE:</b>		
071F1543	Employ Military Justice	4.0
071F1544	Law of Land Warfare	1.0
071F1545	Military Justice Exam	1.0
<b>MODULE-L – ETHICS AND LEADERSHIP:</b>		
071F1390	Army Leadership	4.0
071F1391	Military Ethics I	4.0
071F1392	Ethical Decision Making/Prof Mil E II	4.0
071F1393	Planning and Supervision	4.0
071F1395	Personnel Management System	4.0
071F1396	Leadership Exam	1.0
071F6893	Ethics Case Study – Staff Ride (Optional)	0
<b>MODULE-M – COMMUNICATIVE SKILLS:</b>	<b>This Module must be taught in sequence</b>	
071F1755	Reading Diagnostic	1.0
071F1756	Effective Listening	1.0
071F1757	Clarity	1.0
071F1758	Conciseness	1.0
071F1759	Reading	1.0
071F1760	Briefings	1.0
071F1761	Grammar	1.0
071F1762	Editing	1.0
071F6866	Conduct a Military Briefing	10.0
	<b>TOTAL PHASE II HOURS</b>	<b>243.0</b>

PHASE III		
Lesson Number	Lesson Title	Hours
<b>MODULE-A – ADMINISTRATIVE</b>		
071F6848	CIF Issue	2.5
071F6877	COC & Performance Counseling	15.0
071F6896	CIF Turn-in	12.0
071F6898	In/Out processing Procedures	3.0
071F6900	Graduation Formal	4.0
071F6902	Graduation	4.0
071F6903	Swearing in Ceremony	1.0
071F6916	End of Phase Critique	1.0
<b>MODULE- B – FIELD LEADERSHIP AND BASIC SOLDIER SKILLS AND FIELD CRAFT:</b>		
071F1085	Conduct a tactical TEWT OCS	8.0
071F6851	Confidence/Obstacle Course	5.0
071F6856	Combat Water Survival Test	5.0
071F6858	Leader's Reaction Course	5
071F6878	Field Leadership Exercise 2 (FLX II)	168.0
	<b>TOTAL PHASE III HOURS</b>	<b>233.5</b>
<b>TOTAL PHASE I HOURS</b>		<b>168.5</b>
<b>TOTAL PHASE II HOURS</b>		<b>243.0</b>
<b>TOTAL PHASE III HOURS</b>		<b>233.5</b>
<b>TOTAL HOURS (ALL PHASES)</b>		<b>645.0</b>

**Annex E REQUISITIONING OCS COURSEWARE.**

E-1. **General.** This chapter provides guidance on how to requisition OCS courseware. In the near future, TRADOC will distribute all Army courseware in a digitized format. This media format requires training institutes to have the supporting hardware and budgets to publish the courseware.

E-2. **Sources.**

a. **Army Training and Support Center.** ATSC publishes and distributes the TRADOC-approved courseware; specifically, the TSPs associated with the Warrior Tasks and Battle Drills.

(1) Use school codes to requisition courseware from ATSC as needed. Delivery of courseware from ATSC is through United Parcel Service. School codes must provide a street address with a building number when placing an order.

(2) Address questions and requisitions to the production inventory team.

Commander, U.S. Army Training and Support Center  
ATTN: ATIC-ITT (PIT)  
Account # \_\_\_\_\_  
Fort Eustis, Va. 23504-5206  
DSN 927-3560/3664 or commercial (804) 878-3560/3664

b. **United States Army Infantry School.**

(1) OCS companies requisition required OCS-specific courseware from USAIS using a memorandum format. List the OCS courseware by title and TSP number (if applicable) and the quantity required.

(2) Eventually, all OCS courseware will be digitized. Until then, the Office of the Special Assistant to the Commanding General at USAIS will continue to budget for the publication and distribution of OCS-specific courseware.

(3) Address questions and requisitions to:

Special Assistant to the Commanding General, USAIS  
ATTN: ATZB-RCG  
Building 4, Room 540  
Fort Benning, Ga. 31905-5000  
DSN 835-5741 or Commercial (706) 545-5741

c. **United States Army Publications Distribution Center.** To requisition regulations, field manuals, technical manuals, and Soldiers training publications use the 'pinpoint' distribution process. The U.S. Army Publications Distribution Center in St. Louis, Mo., processes all of these requests.

(1) Eventually all requests for publications will be automated. Until then, school codes can continue to requisition publications using DA Form 4569.

(2) TRADOC Regulation ASQB 93124 contains specific guidance regarding the ordering process that is undergoing complete automation under the Direct Distribution Network.

d. **Defense Mapping Agency.** Requisition military maps through the Defense Mapping Agency. Be sure to reference the specific course and publication number. Address questions and requisitions to:

DMA Consumer Interface Division, Stop D12  
ATTN: OCIJ  
4600 Sangamore Road  
Bethesda, Md. 20816-5003  
Commercial (301) 227-2495 or (800) 826-0342

e. **Local Reproduction.** OCS companies must budget for the expense incurred to reproduce OCS courseware and LAP forms.

(1) In all instances, student handouts must be reproduced in sufficient quantity to allow each candidate to have his own copy.

(2) TSPs arriving at the school code in a digitized format must be printed. OCS companies should keep one set of TSPs on file at all times. Additional copies for instructor use should be used and recovered at the completion of training.

(3) LAP forms require the use of specific card stock. Print large quantities of LORs and Candidate Self-Assessment Reports to support the conduct of leadership assessment throughout the course.

(4) Awareness training TSPs must be locally reproduced and distributed to both candidates and OCS cadre as needed.

(5) Refresher training TSPs must be reproduced and issued by assignment to the candidates. These TSPs are recoverable and can be reissued to a subsequent class.

(6) Specific guidance in both the Platoon Trainer guide and Officer Candidate guide must be published in sufficient quantities to afford distribution to each platoon trainer and candidate, respectively.



**Annex F. FORMS USED IN OCS**

**F-1 GENERAL.** This Annex provides blank forms most commonly used in the OCS Program. These forms are locally reproduced and must be in ample supply to accommodate class size and frequency of use.

**LIST OF FORMS IN THIS ANNEX**

- F-2 OCS Student Enrollment Prerequisite Checklist (white bond, 8.5" X 11")
- F-3 Officer Candidate School Initial Counseling on DA Form 4856 (white bond, 8.5" X 11")
- F-5 Failure of an APFT on DA Form 4856 (white bond, 8.5" X 11", double sided)
- F-7 Failure of an Exam Counseling on DA Form 4856- (white bond, 8.5" X 11", double sided) .
- F-9 Officer Candidate Profile Summary (white bond, 8.5" X 11")
- F-11 Leadership Evaluation Report (LER) ARNGOCS Form 1 (7 pages, white bond, 8.5" X 11", back-to-back)
- F-18 Leadership Evaluation In Brief, ARNGOCS Form 2 (blue card stock, 5.5" X 8.5", back-to-back)
- F-19 Leadership Observation Report, (LOR) ARNGOCS Form 3 (light green card stock, 5.5" X 8.5", back-to-back)
- F-20 Candidate Self-Assessment Report, ARNGOCS Form 4 (yellow card stock, 5.5" X 8.5", back-to-back)
- F-21 Field Leadership Evaluation Report (FLER) ARNGOCS Form 5 (tan cardstock, 5.5" X 8.5", back-to-back)
- F-22 Peer Evaluation Leadership Assessment ARNGOCS Form 6 (white bond, 8.5" X 11", double sided)
- F-24 Leadership Reaction Course Report (LRCR) ARNGOCS Form 7 (light blue cardstock 5.5" X 8.5", back to back)
- F-25 Peer Evaluation Counseling on DA Form 4856- (white bond, 8.5" X 11", double sided)
- F-27 WTBD Evaluation Sheet (white bond, 8.5" X 11")
- F-29 Instructor Performance Checklist (white bond, 8.5" X 11", double sided)
- F-31 Sample Certification Memorandum (white bond, 8.5" X 11")
- F-32 Platoon Trainer Evaluation Form
- F-33 6-Part Cover Sheet for Student Packet
- F-39 Officer Candidate School End of Phase Counseling on DA Form 4856 (white bond, 8.5" X 11")
- F-41 End of Course Summary FB (USAIS) Form 268-R, Oct 06 (white bond, 8.5" X 11", back-to-back)
- F-43 OCS Platoon Trainer / Instructor Qualification / Certification Checklist

NAME (LAST, FIRST, MI) \_\_\_\_\_ SSN \_\_\_\_\_ UNIT/STATE \_\_\_\_\_

\_\_\_\_\_ EMERGENCY CONTACT INFORMATION SHEET.

\_\_\_\_\_ APPLICATION FOR ADMISSION TO OCS (AND/OR ATRRS).

\_\_\_\_\_ LETTER OF RECOMMENDATION.

\_\_\_\_\_ SSN CARD (COPY).

\_\_\_\_\_ ETS DATE (MUST BE LATER THAN END OF COURSE) (PQR OR EXTENSION CONTRACT DA FORM 4836).

\_\_\_\_\_ ATTACHMENT ORDERS TO STATE TRAINING ORGANIZATION \_\_\_\_\_ TDY/TRAVEL ORDERS (AOCS \_\_\_\_\_ TRADITIONAL \_\_\_\_\_).

\_\_\_\_\_ PROMOTION ORDERS TO E-6 (IF E-5 OR BELOW) \* PER AR 600-8-19 (RAR) PARA 7-15b, dtd 16 September 2009.

\_\_\_\_\_ BIRTH CERTIFICATE (COPY) DOB: \_\_\_\_\_ AGE AT COMMISSIONING \_\_\_\_\_ \* (NOT TO EXCEED 41 YEARS AND 364 DAYS).

\_\_\_\_\_ PROOF OF CITIZENSHIP (IF APPLICABLE).

\_\_\_\_\_ NAME CHANGE DOCUMENT (IF APPLICABLE).

\_\_\_\_\_ CHAPTER 2 COMMISSIONING PHYSICAL (DD 2808/2807-1) (DATE : \_\_\_\_\_) (MUST BE WITHIN 24 MONTHS OF COMMISSIONING).

\* (PHA) ANNUAL PERIODIC HEALTH ASSESSMENT IS REQUIRED IF PHYSICAL IS OVER 12 MONTHS OLD.

\_\_\_\_\_ TAG LETTER (90 DAY WAIVER - TRADITIONAL ONLY) (EXCEPTION TO POLICY-CHAPTER 2 PHYSICAL) (IF APPLICABLE).

\_\_\_\_\_ MEDICAL WAIVER (AS REQUIRED) DATE COUNSELED \_\_\_\_\_ DATE REQUESTED \_\_\_\_\_ DATE APPROVED \_\_\_\_\_.

\_\_\_\_\_ COLLEGE TRANSCRIPT: (MIN OF 60 SEM HOURS/90 QTR HRS – TRAD/90 SEM HOURS AND A 4 YEAR DEGREE PRODUCING PLAN - AOCS).  
OFFICIAL TRANSCRIPT \_\_\_\_\_ QTR HRS \_\_\_\_\_ SEM HRS \_\_\_\_\_ DEGREE \_\_\_\_\_.

\_\_\_\_\_ GT SCORE (MIN 110) ANNOTATED ON DA FORM 2-1 OR ENLISTMENT CONTRACT/SCORE: \_\_\_\_\_ (NON-WAIVERABLE).

\_\_\_\_\_ DD 214 (Certificate of release or discharge active duty)/DD 220 (Active duty report)/NGB 22 (Report of separation and record of service).  
REFLECTING ALL NATIONAL GUARD, USAR & ACTIVE DUTY TOURS (MUST REFLECT COMPLETION OF BCT AND AIT).\_\_\_\_\_ WAIVER FOR NON-COMPLETION OF AIT (IF REQUIRED) \_\_\_\_\_ /1 YEAR SERVICE (IF REQUIRED) \_\_\_\_\_.  
DATE COUNSELED \_\_\_\_\_ DATE REQUESTED \_\_\_\_\_ DATE APPROVED \_\_\_\_\_.

\_\_\_\_\_ OCS STATE ENLISTMENT OPTION (COPY OF DD FORM 1966) (IF APPLICABLE).

\_\_\_\_\_ SECURITY CLEARANCE – SECURITY VERIFICATION LETTER/E-QIP/JOINT PERSONNEL ADJUDICATION SYSTEM (JPAS).  
\* SECRET CLEARANCE WILL BE REQUIRED FOR COMMISSIONING.\_\_\_\_\_ MORAL/ CIVIL CONVICTION WAIVERS AS OUTLINED IN NGR 600-100.  
DATE APPROVED \_\_\_\_\_ \* MUST BE APPROVED PRIOR TO START OF COURSE.

\_\_\_\_\_ NGB 62 DRAFT.

\_\_\_\_\_ ATTRS COMPLETION PRINTOUTS: PHASE I \_\_\_\_\_ PHASE II \_\_\_\_\_ PHASE III \_\_\_\_\_ (MUST BE CODED “G” UNDER THE OUTPUT STATUS.  
CODE FIELD FOR SUCCESSFUL GRADUATION OF EACH PHASE BEFORE PROCEEDING TO NEXT PHASE. MUST BE CODED “G” FOR ALL  
3 PHASES TO COMMISSION).

\_\_\_\_\_ DA FORM 705 WITH PASSING APFT SCORE WITHIN 60 DAYS OF PHASE I (FILE IN PART VI).

\_\_\_\_\_ DA 5500-R OR DA 5501-R (AS REQUIRED) HT/WT \_\_\_\_\_ / \_\_\_\_\_ BODY COMPOSITION \_\_\_\_\_ % MAX ALLOWABLE \_\_\_\_\_ %  
(FILE IN PART VI).

\_\_\_\_\_ BIO'S (PROVIDE 3 COPIES).

QA REP: \_\_\_\_\_ DATE: \_\_\_\_\_.  
(SIGNATURE)QA NCOIC/OIC \_\_\_\_\_ DATE: \_\_\_\_\_.  
(SIGNATURE)

MEETS PREREQUISITES: \_\_\_\_\_ DOES NOT MEET PREREQUISITES: \_\_\_\_\_ (SEE REMARKS)

REMARKS: \_\_\_\_\_  
\_\_\_\_\_

<b>DEVELOPMENTAL COUNSELING FORM</b> For use of this form, see FM 6-22; the proponent agency is TRADOC.		
<b>DATA REQUIRED BY THE PRIVACY ACT OF 1974</b> <b>AUTHORITY:</b> 5 USC 301, Departmental Regulations; 10 USC 3013, Secretary of the Army. <b>PRINCIPAL PURPOSE:</b> To assist leaders in conducting and recording counseling data pertaining to subordinates. <b>ROUTINE USES:</b> The DoD Blanket Routine Uses set forth at the beginning of the Army's compilation of systems or records notices also apply to this system. <b>DISCLOSURE:</b> Disclosure is voluntary.		
<b>PART I - ADMINISTRATIVE DATA</b>		
Name (Last, First, MI)	Rank/Grade OC	Date of Counseling
Organization	Name and Title of Counselor	
<b>PART II - BACKGROUND INFORMATION</b> <b>Purpose of Counseling:</b> (Leader states the reason for the counseling, e.g. Performance/Professional or Event-Oriented counseling, and includes the leader's facts and observations prior to the counseling.)  Officer Candidate School (OCS) Initial Counseling		
<b>PART III - SUMMARY OF COUNSELING</b> Complete this section during or immediately subsequent to counseling.		
<b>Key Points of Discussion:</b> The standards required of an Officer Candidate (OC) will be of the highest order. Character and integrity must be an inspiration to others and at all times, conduct must be above reproach. Personal appearance, military bearing, and military courtesy will be of the highest standard at all times. OCs' must meet the following standards IAW the OC Guide and OCS Course Management Plan (CMP) in order to graduate from OCS. <b>ACADEMICS.</b> OCs' must take and pass all examinations with at least a 70% or higher score. OCs' that fail will be retrained and retested. If an OC doesn't obtain a 70% or higher on the retest, they will be subject to release from the OCS Program for academic deficiency. <b>LEADERSHIP.</b> OCs' will serve in various leadership positions during each phase and must achieve an overall satisfactory leadership rating for these positions. The failure of an OC to mature to the level of a 2LT or to adapt to the OCS environment is grounds for dismissal from the OCS program. <b>MORAL CHARACTER.</b> Each OC must have and maintain high moral character considered necessary for a commissioned officer. The OC is subject to the Honor Code at all times. The Honor Code is simple: "An Officer Candidate will not lie, cheat, or steal, nor tolerate those that do." Any violation of the Honor Code is grounds for dismissal from the OCS program. <b>PHYSICAL FITNESS.</b> Each OC must participate in scheduled physical training. At any time the Army Physical Fitness Test (APFT) is administered, the OC must score a minimum of 60 points on each event, with a minimum score of 180 points, IAW NGR 600-100 and FM 21-20. The OC must also complete the mandatory 5-mile, 7-mile and 10-mile foot marches in the prescribed amount of time and with all of their appropriate equipment. They must also complete a 3-mile release run. Failure of any retest for these events is grounds for dismissal from the OCS program. The OC must also participate in a Practical Land Navigation test, Leaders Reaction Course, the Combat Water Survival Test, and the Obstacle/Confidence Course. <b>WEIGHT STANDARD.</b> All OCs must meet and maintain the height and weight standards as published in AR 600-9. <b>ATTENDANCE.</b> Each OC must attend training, which consists of all activities on the training schedule. The loss of 12 cumulative hours of total training time (Phase I, II, and III combined) is grounds for dismissal from the OCS program. <b>MEDICAL.</b> OCs' must report/have disclosed all pre-existing medical conditions or allergies on their chapter 2 physical and/or DA Form 7349-R. I do/do not have any prescription/non-prescription drugs with me. I do/do not have any vitamins with me. I am not or do not suspect I am pregnant. I understand that I must report all injuries or illness to my Platoon Trainer. <b>SECURITY CLEARANCE:</b> OC's must have a final Secret Security Clearance prior to receiving their Commission. <b>OTHER:</b> I do/do not have any firearms or other weapons with me. <b>STUDENT EVALUATION PLAN.</b> A copy of the SEP is provided to each OC.		
<b>OTHER INSTRUCTIONS</b> This form will be destroyed upon: reassignment (other than rehabilitative transfers), separation at ETS, or upon retirement. For separation requirements and notification of loss of benefits/consequences see local directives and AR 635-200.		

**Plan of Action** (Outlines actions that the subordinate will do after the counseling session to reach the agreed upon goal(s). The actions must be specific enough to modify or maintain the subordinate's behavior and include a specified time line for implementation and assessment (Part IV below)

I \_\_\_\_\_ have received the OCS Initial Counseling and have discussed these points with the OCS Cadre/PLATOON TRAINER. I fully understand the duties and responsibilities of being an Officer Candidate in the OCS program. I also understand the course standards required of an Officer Candidate and for graduation from this course. I received a copy of the Student Evaluation Plan (SEP).

**Session Closing:** (The leader summarizes the key points of the session and checks if the subordinate understands the plan of action. The subordinate agrees/disagrees and provides remarks if appropriate.)

Individual counseled: ☐ I agree ☐ disagree with the information above.  
Individual counseled remarks:

Signature of Individual Counseled: \_\_\_\_\_ Date: \_\_\_\_\_

**Leader Responsibilities:** (Leader's responsibilities in implementing the plan of action.)

Signature of Counselor: \_\_\_\_\_ Date: \_\_\_\_\_

#### PART IV - ASSESSMENT OF THE PLAN OF ACTION

**Assessment** (Did the plan of action achieve the desired results? This section is completed by both the leader and the individual counseled and provides useful information for follow-up counseling.)

Counselor: \_\_\_\_\_ Individual Counseled: \_\_\_\_\_ Date of Assessment: \_\_\_\_\_

**Note:** Both the counselor and the individual counseled should retain a record of the counseling.

DEVELOPMENTAL COUNSELING FORM		
For use of this form, see FM 6-22; the proponent agency is TRADOC.		
<b>DATA REQUIRED BY THE PRIVACY ACT OF 1974</b>		
<b>AUTHORITY:</b>	5 USC 301, Departmental Regulations; 10 USC 3013, Secretary of the Army.	
<b>PRINCIPAL PURPOSE:</b>	To assist leaders in conducting and recording counseling data pertaining to subordinates.	
<b>ROUTINE USES:</b>	The DoD Blanket Routine Uses set forth at the beginning of the Army's compilation of systems or records notices also apply to this system.	
<b>DISCLOSURE:</b>	Disclosure is voluntary.	
<b>PART I - ADMINISTRATIVE DATA</b>		
Name (Last, First, MI)	Rank/Grade OC	Date of Counseling
Organization	Name and Title of Counselor	
<b>PART II - BACKGROUND INFORMATION</b>		
<b>Purpose of Counseling:</b> (Leader states the reason for the counseling, e.g. Performance/Professional or Event-Oriented counseling, and includes the leader's facts and observations prior to the counseling.)		
THE PURPOSE OF COUNSELING IS _____ FAILED THE RECORD ARMY PHYSICAL		
FITNESS TEST ON _____ WITH A SCORE OF _____.		
<b>PART III - SUMMARY OF COUNSELING</b>		
Complete this section during or immediately subsequent to counseling.		
<b>Key Points of Discussion:</b>		
OC _____ FAILED THE _____ PORTION(S) OF THE ARMY PHYSICAL FITNESS TEST.		
OC _____ ACHIEVED THE FOLLOWING SCORES ON THE THREE		
EVENTS:		
PUSH-UPS- _____		
SIT-UPS- _____		
2-MILE RUN- _____		
TOTAL- _____		
OC _____ WAS COUNSELED THAT HE/SHE IS REQUIRED TO SCORE A MINIMUM OF 180 ON THE TEST WITH 60 POINTS ON EACH OF THE PUSH-UP, SIT-UP AND THE TWO-MILE RUN EVENTS IAW FM 21-20.		
OC _____ WAS INFORMED THAT HE/SHE WILL HAVE A RE-TEST ARMY PHYSICAL FITNESS TEST ON _____ AT _____ HRS.		
OC _____ WAS INFORMED THAT IF HE/SHE FAILS TO MEET THE STANDARDS OUTLINED IN FM 21-20 THEY WILL BE DISMISSED FROM OCS.		
<b>OTHER INSTRUCTIONS</b>		
This form will be destroyed upon: reassignment (other than rehabilitative transfers), separation at ETS, or upon retirement. For separation requirements and notification of loss of benefits/consequences see local directives and AR 635-200.		

**Plan of Action** (Outlines actions that the subordinate will do after the counseling session to reach the agreed upon goal(s). The actions must be specific enough to modify or maintain the subordinate's behavior and include a specified time line for implementation and assessment (Part IV below)

OC \_\_\_\_\_ will improve his/her level of physical fitness by studying the FM 21-20 and Focus on the areas listed on the reverse side of this form. OC \_\_\_\_\_ will attend remedial PT in which he/she will work to improve his/her level of physical fitness.

**Session Closing:** (The leader summarizes the key points of the session and checks if the subordinate understands the plan of action. The subordinate agrees/disagrees and provides remarks if appropriate.)

Individual counseled: ☐ I agree ☐ disagree with the information above.  
Individual counseled remarks:

Signature of Individual Counseled: \_\_\_\_\_ Date: \_\_\_\_\_

**Leader Responsibilities:** (Leader's responsibilities in implementing the plan of action.)

THE CANDIDATE WAS INFORMED ON USING FM 21-20 AS A REFERENCE IN UNDERSTANDING THE VARIOUS TYPES OF EXERCISE, AEROBIC AND ANEROBIC TO INCREASE PHYSICAL FITNESS LEVEL. HE/SHE WAS SHOWN FROM THE FM 21-20 SEVERAL EXERCISES TO INCLUDE STRETCHING, CARDIORESPIRATORY FITNESS, MUSCULAR ENDURANCE AND STRENGTH. AN FM 21-20 IS AVAILABLE FOR REFERENCE BY THE CANDIDATE.

Signature of Counselor: \_\_\_\_\_ Date: \_\_\_\_\_

#### PART IV - ASSESSMENT OF THE PLAN OF ACTION

**Assessment** (Did the plan of action achieve the desired results? This section is completed by both the leader and the individual counseled and provides useful information for follow-up counseling.)

Counselor: \_\_\_\_\_ Individual Counseled: \_\_\_\_\_ Date of Assessment: \_\_\_\_\_

**Note:** Both the counselor and the individual counseled should retain a record of the counseling.

DEVELOPMENTAL COUNSELING FORM		
For use of this form, see FM 6-22; the proponent agency is TRADOC.		
<b>DATA REQUIRED BY THE PRIVACY ACT OF 1974</b>		
<b>AUTHORITY:</b>	5 USC 301, Departmental Regulations; 10 USC 3013, Secretary of the Army.	
<b>PRINCIPAL PURPOSE:</b>	To assist leaders in conducting and recording counseling data pertaining to subordinates.	
<b>ROUTINE USES:</b>	The DoD Blanket Routine Uses set forth at the beginning of the Army's compilation of systems or records notices also apply to this system.	
<b>DISCLOSURE:</b>	Disclosure is voluntary.	
<b>PART I - ADMINISTRATIVE DATA</b>		
Name (Last, First, MI)	Rank/Grade OC	Date of Counseling
Organization	Name and Title of Counselor	
<b>PART II - BACKGROUND INFORMATION</b>		
<b>Purpose of Counseling:</b> (Leader states the reason for the counseling, e.g. Performance/Professional or Event-Oriented counseling, and includes the leader's facts and observations prior to the counseling.)		
THE PURPOSE OF COUNSELING IS _____ FAILED THE _____ EXAM WITH A SCORE OF _____.		
<b>PART III - SUMMARY OF COUNSELING</b>		
Complete this section during or immediately subsequent to counseling.		
<b>Key Points of Discussion:</b>		
_____ WAS INFORMED THAT HE/SHE WILL HAVE A RE-TEST STUDY HALL ON _____ AT _____ HRS. IN BUILDING _____ ROOM _____.		
THE STUDY HALL INSTRUCTOR WILL BE _____.		
THE _____ EXAM RE-TEST WILL BE ON _____ AT _____ HRS. IN BUILDING _____ ROOM _____.		
THE _____ RE-TEST INSTRUCTOR WILL BE _____.		
_____ WAS INFORMED THAT IF HE/SHE PASSES THE RE-TEST, HE/SHE WILL BE CREDITED WITH A SCORE OF 70.		
_____ WAS INFORMED THAT IF HE/SHE FAILS TO SCORE A MINIMUM OF 70 ON THE _____ RE-TEST, HE/SHE WILL BE DISMISSED FROM THE OFFICER CANDIDATE SCHOOL PROGRAM.		
<b>OTHER INSTRUCTIONS</b>		
This form will be destroyed upon: reassignment (other than rehabilitative transfers), separation at ETS, or upon retirement. For separation requirements and notification of loss of benefits/consequences see local directives and AR 635-200.		

**Plan of Action** (Outlines actions that the subordinate will do after the counseling session to reach the agreed upon goal(s). The actions must be specific enough to modify or maintain the subordinate's behavior and include a specified time line for implementation and assessment (Part IV below).

OC \_\_\_\_\_ will attend the re-test study hall and ask questions until he/she feels comfortable with the material covered.

**Session Closing:** (The leader summarizes the key points of the session and checks if the subordinate understands the plan of action. The subordinate agrees/disagrees and provides remarks if appropriate.)

Individual counseled: ☐ I agree ☐ disagree with the information above.  
Individual counseled remarks:

Signature of Individual Counseled: \_\_\_\_\_ Date: \_\_\_\_\_

**Leader Responsibilities:** *(Leader's responsibilities in implementing the plan of action.)*

The Candidate will be afforded the opportunity to attend the re-test study hall. The OC will also be given ample time in order to prepare him/her self for the re-test.

Signature of Counselor: \_\_\_\_\_ Date: \_\_\_\_\_

#### PART IV - ASSESSMENT OF THE PLAN OF ACTION

**Assessment** (Did the plan of action achieve the desired results? This section is completed by both the leader and the individual counseled and provides useful information for follow-up counseling.)

OC \_\_\_\_\_ Passed / Failed the \_\_\_\_\_ Exam Re-Test.

Counselor: \_\_\_\_\_ Individual Counseled: \_\_\_\_\_ Date of Assessment: \_\_\_\_\_

**Note: Both the counselor and the individual counseled should retain a record of the counseling.**



OFFICER CANDIDATE PROFILE SUMMARY					
<p align="center">PRIVACY ACT STATEMENT</p> <p><u>AUTHORITY:</u> 10 U.S. Code 133, Executive Order 9397, November 22, 1943 (Social Security Number) and Title 10, United States Code, Section 3012</p> <p><u>PRINCIPAL PURPOSE:</u> Used by candidate to supply information necessary for student enrollment in the OCS Program.</p> <p><u>ROUTINE USE:</u> Used by appropriate authority for administrative processing, provide points of contact in case of emergency and background information essential for student identification.</p> <p><u>DISCLOSURE:</u> Voluntary; however, failure to complete the form may result in candidate's rejection for further training.</p>					
NAME - Last		First		MI	AGE
RANK	MOS	COMMISSIONING BRANCH	DOB	SSAN	
COMPONENT  <input type="checkbox"/> RA <input type="checkbox"/> USAR <input type="checkbox"/> ARNG <input type="checkbox"/> ENLISTED OPTION  STATE (FOR ARNG ONLY) : _____		RACE  <input type="checkbox"/> CAUCASIAN <input type="checkbox"/> BLACK <input type="checkbox"/> HISPANIC <input type="checkbox"/> NATIVE AMERICAN <input type="checkbox"/> ASIAN <input type="checkbox"/> OTHER _____		SEX  <input type="checkbox"/> MALE <input type="checkbox"/> FEMALE  SWIM <input type="checkbox"/> YES <input type="checkbox"/> NO  <input type="checkbox"/> WEAK: _____	
				PROFILES  <input type="checkbox"/> YES <input type="checkbox"/> NO FOR: _____  INJURY: <input type="checkbox"/> INSECT  <input type="checkbox"/> HOT <input type="checkbox"/> COLD	
MARITAL STATUS  <input type="checkbox"/> MARRIED  <input type="checkbox"/> DIVORCED  <input type="checkbox"/> SEPARATED  <input type="checkbox"/> SINGLE		SPOUSE'S NAME		ANNIVERSARY	
		SPOUSE'S DOB		PREGNANT: <input type="checkbox"/> YES <input type="checkbox"/> NO	
		DUE DATE			
		DEPENDENTS' NAMES		DOB	
HOME OF RECORD				PHONE	
		PLACE OF BIRTH			
NEXT OF KIN AND RELATIONSHIP				PHONE	
SPOUSE'S ADDRESS (IF DIFFERENT FROM HOR)				PHONE	

OFFICER CANDIDATE PROFILE SUMMARY (continued)		
RELIGION	SPECIAL NEEDS	
MILITARY EDUCATION AND SCHOOLS	CIVILIAN EDUCATION AND SCHOOLS	
		INSTITUTION
		DEGREE
		SUBJECT/DISCIPLINE
SECURITY CLEARANCE <input type="checkbox"/> YES <input type="checkbox"/> NO	AUTO <input type="checkbox"/> YES <input type="checkbox"/> NO 2	TYPE
TYPE	INSURED	COLOR
	LICENSE (STATE)	LICENSE (NUMBER)
	REGISTRATION (STATE)	REGISTRATION (NUMBER)
PREVIOUS UNIT	MILITARY SERVICE TIME	
POST/FORT:	ACTIVE ____YRS ____MOS	RESERVE ____YRS ____MOS
DISTINGUISHED RELATIVE(S) OF CANDIDATE: <i>A distinguished relative is an officer, active or retired, of grade O-6 (COL) or higher, an enlisted Soldier of grade E-8 (MSG) or E-9 (SGM), a United States Representative or Senator, or a Federal Civil Service employee with the grade GS-16 or above. The relationship should be in the immediate family (parent, brother, sister, grandparent, aunt, or uncle).</i>		
RELATIVE	STATUS/POSITION	RELATIONSHIP

**LEADERSHIP EVALUATION REPORT**

PART I - ADMINISTRATIVE DATA					
CANDIDATE NAME (Last, First MI)		CO/PLT/SQD	PHASE	DATE	POSITION
RATER'S NAME / RANK / POSITION	PERIOD COVERED	FROM DAY MONTH YEAR		TO DAY MONTH YEAR	
PART II - EXPLANATION OF RATING SYSTEM					
SCALE					
E (Excellent)		S (Satisfactory)		N (Not Satisfactory)	
PART III - DUTY DESCRIPTION					
SEE FORMS FOLDER ON OCS WEBSITE FOR DUTY DESCRIPTION FORMS					
PART IV - PERFORMANCE EVALUATION (ARMY VALUES, CORE LEADER COMPETENCIES, AND LEADER ATTRIBUTES IAW FM 6-22)					
ARMY VALUES	ACTS IAW		REMARKS		
LOYALTY	Y	N			
DUTY	Y	N			
RESPECT	Y	N			
SELFLESS SERVICE	Y	N			
HONOR	Y	N			
INTEGRITY	Y	N			
PERSONAL COURAGE	Y	N			
Comments mandatory on a DA Form 4856 for all "NO" entries					

## LEADERSHIP EVALUATION REPORT

In pages 2 thru 6 comments must be made on at least two Leads Competencies, at least two Develops Competencies, and at least one Achieves Competencies. Each evaluated competency must be complemented by at least one Attribute. See Appendix A, FM 6-22 Army Leadership.

## PART IV - PERFORMANCE EVALUATION CONTINUED

## Core Competencies - LEADS (must evaluate at least two Leads Competencies)

<i>Leads Others</i>	RATING			REMARKS
	E	S	N	
Established and imparts clear intent and purpose				
Uses appropriate influence techniques to energize others				
Conveys the significance of the work				
Maintains and enforces high professional standards				
Balances requirements of mission with welfare of followers				
<i>Extends Influence Beyond the Chain of Command</i>	RATING			REMARKS
	E	S	N	
Understands sphere of influence, means of influence, and limits of influence				
Builds trust				
Negotiates for understanding, builds consensus, and resolves conflict				
Builds and maintains alliances				
<b>CANDIDATES LAST NAME</b>				

## LEADERSHIP EVALUATION REPORT

## PART IV - PERFORMANCE EVALUATION CONTINUED

## Core Competencies - LEADS (must evaluate at least two Leads Competencies)

<i>Leads By Example</i>	RATING			REMARKS	
	E	S	N		
Displays character by modeling the Army Values consistently through actions, attitudes, and communications					
Exemplifies the Warrior Ethos					
Demonstrates commitment to the Nation, Army, unit, Soldiers, community, and multinational partners					
Leads with confidence in adverse situations					
Demonstrates technical and tactical knowledge and skills					
Understands the importance of conceptual skills and models them to others					
Seeks and is open to diverse ideas and points of view					
<i>Communicates</i>	RATING			REMARKS	
	E	S	N		
Listens actively					
Determines information-sharing strategies					
Employs engaging communication techniques					
Conveys thoughts and ideas to ensure shared understanding					
Presents recommendations so others understands advantages					
Is sensitive to cultural factors in communication					
<b>CANDIDATES LAST NAME</b>					

## LEADERSHIP EVALUATION REPORT

## PART IV - PERFORMANCE EVALUATION CONTINUED

## Core Competencies - DEVELOPS (must evaluate at least two Develops Competencies)

<b><i>Creates a Positive Environment</i></b>	<b>RATING</b>			<b>REMARKS</b>
	<b>E</b>	<b>S</b>	<b>N</b>	
Fosters teamwork, cohesion, cooperation, and loyalty				
Encourages subordinates to exercise initiative, accept responsibility, and take ownership				
Creates a learning environment				
Encourages open and candid communications				
Encourages fairness and inclusiveness				
Expresses and demonstrates care for people and their well-being				
Sets and maintains high expectations for individuals and teams				
Accepts reasonable setbacks and failures				
<b><i>Prepares Self</i></b>	<b>RATING</b>			<b>REMARKS</b>
	<b>E</b>	<b>S</b>	<b>N</b>	
Maintains mental and physical health and well-being				
Maintains self awareness: employs self understanding and recognizes impact on others				
Evaluates and incorporates feedback from others				
Expands knowledge of technical, technological, and tactical areas				
Expands conceptual and interpersonal capabilities				
Analyzes and organizes information to create knowledge				
Maintains relevant cultural awareness				
<b>CANDIDATES LAST NAME</b>				

## LEADERSHIP EVALUATION REPORT

PART IV - PERFORMANCE EVALUATION CONTINUED				
Core Competencies - DEVELOPS (must evaluate at least two Develops Competencies)				
<i>Develops Others</i>	RATING			REMARKS
	E	S	N	
Assesses current developmental needs of others				
Fosters job development, job challenge, and job enrichment				
Counsels, coaches, and mentors				
Builds team or group skills and processes				
PART IV - PERFORMANCE EVALUATION CONTINUED				
Core Competencies - ACHIEVES (must evaluate at least one Achieves Competencies)				
<i>Gets Results</i>	RATING			REMARKS
	E	S	N	
Prioritizes, organizes, and coordinates taskings for teams or other organizational structures/groups				
Identifies and accounts for individual and group capabilities and commitment to task				
Designates, clarifies, and deconflicts roles				
Identifies, contends for, allocates, and manages resources				
Seeks, recognizes, and takes advantages of opportunities to improve performance				
Makes feedback part of work processes				
Executes plans to accomplish the mission				
Identifies and adjusts to external influences on the mission or taskings and organization				
<b>CANDIDATES LAST NAME</b>				

## LEADERSHIP EVALUATION REPORT

## PART IV - PERFORMANCE EVALUATION CONTINUED

## Attributes

(each of the evaluated Core Leader Competencies must be complemented with at least one Attribute)

<i>A Leader of Character</i>	RATING			REMARKS
	E	S	N	
Army Values				
Empathy				
Warrior Ethos				
<i>A Leader with Presence</i>	RATING			REMARKS
	E	S	N	
Military bearing				
Physically fit				
Confident				
Resilient				
<i>A Leader with Intellectual Capacity</i>	RATING			REMARKS
	E	S	N	
Agility				
Judgment				
Innovative				
Interpersonal tact				
Domain knowledge				
<b>CANDIDATES LAST NAME</b>				



## LEADERSHIP EVALUATION REPORT

PART V - PERFORMANCE RECOMMENDATIONS and SUMMARY OF COUNSELING	
Overall Evaluation	
<b>E</b> (Excellent)	<b>S</b> (Satisfactory) <b>N</b> (Not Satisfactory)
Summary of Counseling and Recommendations	
Candidate's Plan for Improvement	
Follow-Up	
Rater's Signature	Date Signed
Candidate's Signature	Date Signed

**LEADERSHIP EVALUATION IN BRIEF**

<b>PART I - ADMINISTRATIVE DATA</b>				
CANDIDATE NAME (Last, First, MI)	CO/PLT/SQD	PHASE	DATE	POSITION
RATER'S NAME / RANK / POS	FROM: DAY / MONTH / YEAR		TO: DAY / MONTH / YEAR	
<b>PART II - EXPLANATION OF RATING SYSTEM</b>				
SCALE				
OVERALL NET ASSESSMENT (Circle one) <b>E</b> (Excellent) <b>S</b> (Satisfactory) <b>N</b> (Not Satisfactory)				
<b>PART III – DUTY DESCRIPTION</b>				
SEE OCS WEBSITE FOR DUTY DESCRIPTION FORMS				
<b>PART IV - CRITICAL EVENTS / EXPECTATIONS</b>				

ARNGOCS Form 2

**LEADERSHIP EVALUATION IN BRIEF**

<b>PART V - SUMMARY</b>	
Date and Summary of Counseling:	
Candidate's Comments on Expectations:	
Rater's Signature and Date:	Candidate's Signature and Date:

ARNGOCS Form 2

LEADERSHIP OBSERVATION REPORT				
Roster #				
1. NAME (LAST, FIRST MI)	2. RANK	3. POSITION	4. PHASE	5. DATE
6. UNIT ____ COMPANY ____ PLT ____ SQD			NATURE OF REPORT:	
LEADERSHIP/SPOT NEGATIVE/SPOT POSITIVE				
ARMY VALUES / CORE LEADER COMPETENCIES/ATTRIBUTES				
ARMY VALUES				
Loyalty	Duty	Respect	Selfless-Service	Honor Integrity Personal Courage
CORE LEADER COMPETENCIES			ATTRIBUTES	
<u>Leads</u> Leads others Extends influence beyond the Chain of Command Leads by Example Communicates			<u>Develops</u> Creates a positive environment Prepares self Develops others	
<u>Achieves</u> Gets Results			<u>Leader of Character</u> Army Values Empathy Warrior Ethos	
			<u>Leader with Presence</u> Military Bearing Physically Fit Composed, confident Resilient	
			<u>Leader with Intellectual Capacity</u> Mental agility Sound Judgment Innovation Interpersonal tact Domain knowledge	
OBSERVATIONS AND REMARKS (TIME/EVENT/RESULTS)				

ARNGOCS Form 3

OBSERVATION AND REMARKS (TIME/EVENT/RESULTS) CONT.			
CORRECTIVE TRAINING/ COURSE OF ACTION TO BE TAKEN			
CADRE SIGNATURE	DATE	CANDIDATE SIGNATURE	DATE

ARNGOCS Form 3

CANDIDATE SELF-ASSESSMENT REPORT			
1. NAME (Last, First, MI)	2. CO/PLT	3. PHASE	4. DUTY POSITION
5. UNIT____COMPANY	FROM: DAY/MONTH/YEAR		TO: DAY/MONTH/YEAR
6. Roster #:			
SUMMARY OF PERFORMANCE (Describe the assigned <u>T</u> ime, the <u>E</u> vent, and the <u>R</u> esults)			

ARNGOCS Form 4

<b>SUMMARY CONTINUED (List primary strengths and weaknesses)</b>	
<b>ACTIONS I WILL TAKE TO IMPROVE</b>	
<b>CANDIDATE SIGNATURE</b>	<b>DATE</b>

ARNGOCS Form 4

FIELD LEADERSHIP EVALUATION REPORT				
CANDIDATE NAME (LAST, FIRST, MI)	CO/PLT/SQD	PHASE	DATE	POSITION
E-S-NI      TROOP LEADING PROCEDURES				
RECEIVE THE MISSION		COMMENTS:		
ISSUE WARNING ORDER		COMMENTS:		
MAKE A TENTATIVE PLAN		COMMENTS:		
START NECESS. MOVMT		COMMENTS:		
RECONNAISSANCE		COMMENTS:		
COMPLETE PLAN		COMMENTS:		
ISSUE OPORD		COMMENTS:		
SUPERVISE / REFINE		COMMENTS:		
<div style="display: flex; justify-content: space-between; align-items: center;"> <div style="border: 1px solid black; padding: 2px 5px; text-align: center;">E – EXCELLENT</div> <div>Exceeds requirements</div> <div style="border: 1px solid black; padding: 2px 5px; text-align: center;">S – SATISFACTORY</div> <div>Meets requirements</div> <div style="border: 1px solid black; padding: 2px 5px; text-align: center;">NI – NEEDS IMPROVEMENT</div> <div>Fails to meet requirements</div> </div>				

ARNGOCS Form 5

OBSERVATIONS AND REMARKS		
SUSTAIN		
IMPROVE		
SUMMARY		
LEADERSHIP PERFORMANCE RATING		
<div style="display: flex; align-items: center; justify-content: center;"> <div style="text-align: right; margin-right: 10px;">HIGH DEGREE</div> <div style="text-align: center;"> <div style="display: flex; align-items: center; gap: 10px;"> <div style="border: 1px solid black; padding: 2px 5px;">E</div> <div style="border: 1px solid black; padding: 2px 5px;">S</div> <div style="border: 1px solid black; padding: 2px 5px;">NI</div> </div> </div> <div style="text-align: left; margin-left: 10px;">LOW DEGREE</div> </div>		
RATER NAME (LAST, FIRST MI), RANK	RATER SIGNATURE	DATE
CANDIDATE NAME (LAST, FIRST MI)	CANDIDATE SIGNATURE	DATE

PEER EVALUATION LEADERSHIP ASSESSMENT FORM				
RATED CANDIDATE'S PRINTED NAME:				
1 Strongly Agree	2 Agree	3 Disagree	4 Strongly Disagree	
USING THE RATING SCHEME, ABOVE, READ AND INDICATE A RESPONSE FOR EACH OF THE LEADERSHIP PERFORMANCE INDICATORS BELOW REGARDING A PEER. JUSTIFY RATING OF ONE OR FOUR ON THE REVERSE SIDE OF THIS FORM.				
DOMAIN KNOWLEDGE				
1. Technical Knowledge – understands a particular function or system.			1	2 3 4
2. Tactical knowledge – understands military tactics related to securing a designated objective through military means.			1	2 3 4
3. Understands cultural, geographic and political differences and sensitivities			1	2 3 4
COMMUNICATES				
4. Expresses thoughts and ideas clearly to individuals and groups.			1	2 3 4
5. Listens closely to others and pays attention to what they say.			1	2 3 4
6. Writes effectively and is able to organize and explain thoughts clearly.			1	2 3 4
7. Keeps higher and lower headquarters, superiors, and subordinates informed.			1	2 3 4
LEADS BY EXAMPLE				
8. Shows good moral judgment and behavior.			1	2 3 4
9. Displays character by modeling the Army Values consistently through actions, attitudes, and communication.			1	2 3 4
10. Displays high standards of duty, personal appearance, military bearing, physical fitness and ethics.			1	2 3 4
GETS RESULTS				
11. Uses planning to ensure each course of action achieves the desired outcome.			1	2 3 4
12. Plans to ensure all tasks can be executed in the time available and that tasks are executed in the correct sequence.			1	2 3 4
13. Gathers and analyzes relevant information about changing situations.			1	2 3 4
PREPARES SELF				
14. Learns new approaches to problem solving.			1	2 3 4
15. Learns from mistakes and makes corrections, learns from experience.			1	2 3 4
16. Identifies reliable sources of data and other resources related to acquiring knowledge.			1	2 3 4
17. Seeks feedback on how others view one's own actions.			1	2 3 4
DECISION MAKING				
18. Knows what decisions to make and what decisions to delegate to subordinates.			1	2 3 4
19. Involves others in decisions and keeps them informed of consequences that affect them.			1	2 3 4
EXTENDS INFLUENCE BEYOND THE CHAIN OF COMMAND				
20. Gains cooperation or support when working with others.			1	2 3 4
21. Follows through on actions related to expectations of others.			1	2 3 4
CREATES A POSITIVE ENVIRONMENT				
22. Promotes teamwork and team achievement to build trust.			1	2 3 4
23. Shows others how to accomplish tasks while remaining respectful, resolute and focused.			1	2 3 4

ARNG OCS Form 6

Raters Printed Name:

Total Score:

Raters Signature:

**3 Areas Candidate Should Sustain**

1.

2.

3.

**3 Areas Candidate Should Improve**

1.

2.

3.

**Use the area below to make comments justifying 1's and 4's**

Leadership Reaction Course Report					
1. NAME (LAST, FIRST MI)	2. RANK	3. POSITION	4. PHASE	5. ROSTER #	6. DATE
7. UNIT ___ COMPANY ___ PLT ___ SQD ___			NATURE OF REPORT :		
8. LAST FOUR:			LEADERSHIP REACTION COURSE ASSESMENT		
Competent, Confident, and Agile					
Leads others, Extends influence beyond chain, Leads by example, Communicates					
Did the Officer Candidate	GO	NO GO	Comments		
Take charge of the squad					
Assign tasks and delegate					
Manage the squad and utilize available assets					
Execute the task given in the time allotted					
Adjust to the team dynamic and course obstacles					
Focus on the team effort					
Define the purpose and goals of the mission					
Motivate the squad and maintain composure					
Influence the squad members					
Balance mission with welfare and safety of their soldiers					

ARNGOCS Form 7

**SUMMARY**

CANDIDATE SUSTAIN (3)

CANDIDATE IMPROVE (3)

**E-EXCELLENT** Exceeds requirements      **S-SATISFACTORY** Meets requirements      **N-NEEDS IMPROVMENT** Fails to meet requirements

**HIGH**      ← Leadership Performance Rating →      **LOW**  
**DEGREE**      **E**      **S**      **N**      **DEGREE**

CADRE NAME (last, first, mi) Rank	CADRE SIGNATURE	DATE	CANDIDATE SIGNATURE	DATE
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ARNGOCS Form 7



DEVELOPMENTAL COUNSELING FORM		
For use of this form, see FM 6-22; the proponent agency is TRADOC.		
<b>DATA REQUIRED BY THE PRIVACY ACT OF 1974</b>		
<b>AUTHORITY:</b>	5 USC 301, Departmental Regulations; 10 USC 3013, Secretary of the Army.	
<b>PRINCIPAL PURPOSE:</b>	To assist leaders in conducting and recording counseling data pertaining to subordinates.	
<b>ROUTINE USES:</b>	The DoD Blanket Routine Uses set forth at the beginning of the Army's compilation of systems or records notices also apply to this system.	
<b>DISCLOSURE:</b>	Disclosure is voluntary.	
<b>PART I - ADMINISTRATIVE DATA</b>		
Name (Last, First, MI)	Rank/Grade OC	Date of Counseling
Organization	Name and Title of Counselor	
<b>PART II - BACKGROUND INFORMATION</b>		
<b>Purpose of Counseling:</b> (Leader states the reason for the counseling, e.g. Performance/Professional or Event-Oriented counseling, and includes the leader's facts and observations prior to the counseling.)		
The purpose of this counseling is performance counseling based upon OCS Phase ____ student peer evaluations completed ____.		
<b>PART III - SUMMARY OF COUNSELING</b>		
Complete this section during or immediately subsequent to counseling.		
<b>Key Points of Discussion:</b>		
OC _____ was ranked _____ out of _____ in his/her class.		
The following are areas that his/her fellow candidates stated he should sustain and improve in:		
3 SUSTAIN		
3 IMPROVE		
<b>OTHER INSTRUCTIONS</b>		
This form will be destroyed upon: reassignment (other than rehabilitative transfers), separation at ETS, or upon retirement. For separation requirements and notification of loss of benefits/consequences see local directives and AR 635-200.		

**Plan of Action** (Outlines actions that the subordinate will do after the counseling session to reach the agreed upon goal(s). The actions must be specific enough to modify or maintain the subordinate's behavior and include a specified time line for implementation and assessment (Part IV below)

OC \_\_\_\_\_ needs to continue to work on the areas listed to improve in Section II on the reverse side.

**Session Closing:** (The leader summarizes the key points of the session and checks if the subordinate understands the plan of action. The subordinate agrees/disagrees and provides remarks if appropriate.)

Individual counseled: ☐ I agree ☐ disagree with the information above.

Individual counseled remarks:

Signature of Individual Counseled: \_\_\_\_\_ Date: \_\_\_\_\_

**Leader Responsibilities:** (Leader's responsibilities in implementing the plan of action.)

Signature of Counselor: \_\_\_\_\_ Date: \_\_\_\_\_

#### PART IV - ASSESSMENT OF THE PLAN OF ACTION

**Assessment** (Did the plan of action achieve the desired results? This section is completed by both the leader and the individual counseled and provides useful information for follow-up counseling.)

Counselor: \_\_\_\_\_ Individual Counseled: \_\_\_\_\_ Date of Assessment: \_\_\_\_\_

**Note:** Both the counselor and the individual counseled should retain a record of the counseling.

## Phase I WTBD EVALUATION SHEET

DATE: \_\_\_\_\_

Candidate's Name: \_\_\_\_\_

SQ/PLT: \_\_\_\_\_  
STATE: \_\_\_\_\_

(Cadre will record Go/No Go with date and initials.)

TASK TO BE EVALUATED:	1st Attempt	2 <sup>nd</sup> Attempt	REMARKS
<b>Phase 1</b>			
<b>M16A2</b>			
Assemble/Disassemble (071-311-2025)			Completion Date: _____
Correct Malfunctions (071-311-2029)			Completion Date: _____
Load/Clear Ammunition (071-311-2027/2028)			Completion Date: _____
Perform Functions Check (071-311-2026)			Completion Date: _____
<b>M249 SAW</b>			
Assemble/Disassemble (071-312-4025)			Completion Date: _____
Correct Malfunctions (071-312-4029)			Completion Date: _____
Load/Clear Ammunition (071-4027/4028)			Completion Date: _____
Perform Functions Check (071-4026)			Completion Date: _____
<b>M240B MG</b>			
Assemble/Disassemble (071-025-0001)			Completion Date: _____
Correct Malfunctions (071-025-0005)			Completion Date: _____
Load/Clear Ammunition (071-025-0003/0004)			Completion Date: _____

**TASS ARNG OCS****01 May 2011**

Perform Functions Check (071-025-0002)			Completion Date:_____
Mount/dismount using M122A1 tripod (071-025-0015/0016)			Completion Date:_____
<b>FIRST AID</b>			
Evaluate a Casualty (081-831-1001)			Completion Date:_____
Perform 1st Aid for Bleeding Extremity (081-831-1032)			Completion Date:_____
<b>Perform 1st Aid for open wound</b>			
Abdominal (081-831-1025)			Completion Date:_____
Chest (081-831-1026)			Completion Date:_____
Head (081-831-1033)			Completion Date:_____
<b>NBC</b>			
React to Chem or Biological attack/hazard (031-503-1019)			Completion Date:_____
Decontaminate self and individual equipment (031-503-1013)			Completion Date:_____
Perform 1st Aid for Nerve Agent Injury (081-831-1044)			Completion Date:_____
<b>Hand Grenades</b>			
Identify grenade types (071-325-4401)			Completion Date:_____
Throw hand grenade (071-325-4407)			Completion Date:_____
<b>Claymore Mine</b>			
Employ Claymore Mine (071-325-4425)			Completion Date:_____
Recover Claymore Mine (071-325-4426)			Completion Date:_____

## ARNG OCS INSTRUCTOR PERFORMANCE CHECKLIST

## Part One

RANK/INSTRUCTORS NAME (FIRST, LAST, MI)		DATE	TRAINING SITE		
SUBJECT		GO	NO GO	NA	
<b>A</b>	<b>INTRODUCTION:</b> Must receive GO on TLO and four of six introduction items.				
	<b>MOTIVATOR</b> (Gain student attention, explain why student must perform task, consequences of non-performance, relates task to battlefield or job requirements.)				
	<b>TLO</b> (Describes exactly the task the student must perform under what conditions and to what standard.)				
	<b>SAFETY REQUIREMENTS</b> (Explain safety requirements or explain if none exist.)				
	<b>RISK ASSESSMENT</b> (State the risk assessment level for the lesson.)				
	<b>ENVIRONMENTAL CONSIDERATIONS</b> (Explain environmental considerations or state that none exist.)				
	<b>EVALUATION</b> (Identify how, when, and where the TLO will be evaluated, including length of the test and the minimum passing score.)				
	<b>INSTRUCTIONAL LEAD-IN</b> (Explains how training will be conducted, tested, and how it differs from actual job performance.)				
<b>B</b>	<b>PRESENTATION:</b> Must receive GO on Safety and four of five Presentation items.				
	<b>ELO</b> (Supports student learning of TLO, describes exactly what student must be capable of performing under the stated condition to the prescribed standard.)				
	<b>LEARNING STEPS/ACTIVITIES</b> (Includes, tells and/or shows cues, shows steps in parts, asks questions, explains key points, uses logical sequence, uses smooth transitions, covers material in lesson plan.)				
	<b>STUDENT INTERACTION</b> (Engages students early and often, every 3-5 minutes. Asks questions using A-P-C.) (Ask, Pause, Call)				
	<b>MANNERISMS</b> includes well-groomed appearance, confident bearing, enthusiasm, no distracting mannerisms. Good commo skills & eye contact.)				
	<b>TRAINING AIDES</b> (Equipment operational and used properly, visuals are legible and appropriate.)				
	<b>SAFETY</b> (gives appropriate warnings and cautions, STOPS training if dangerous situation occurs.)				
<b>C</b>	<b>SUMMARY:</b> Must receive GO on Review/Summarize Lesson.				
	<b>REVIEW/SUMMARIZE LESSON</b> (Both internal and concluding.)				
	<b>CHECK ON LEARNING</b> (Determine if students are learning by asking review questions or having students demonstrate performance skill.)				
<b>D</b>	<b>OTHER:</b> Must receive GO on Time Management.				
	<b>TRAINING ENVIRONMENT</b> (Includes ventilation, lighting, temperature, noise, interruptions, safety signs, safety equipment, placement of visitor station, cleanliness & acceptable space. Sufficient materials and resources available. Retains control of class.)				
	<b>TIME MANAGEMENT</b> (Conducts training within the time requirements.)				

[illegible]

Instructor Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Instructor Printed Name: \_\_\_\_\_

Evaluator Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Evaluator Printed Name: \_\_\_\_\_ Rank: \_\_\_\_\_ Duty Position: \_\_\_\_\_



Office Symbol

(HEADER)  
STATE OF \_\_\_\_\_, DEPARTMENT OF MILITARY AFFAIRS  
\_\_\_\_\_ **ARMY NATIONAL GUARD**  
Headquarters, 00 Battalion (OCS), 000 Regiment RTI  
000 East Street  
Anywhere, USA 00000-0000



\_\_\_\_\_ 2011

MEMORANDUM FOR RECORD

SUBJECT: OCS Proponent Certification

1. References

- a. TR 350-70
- b. TR 350-18
- c. ARNG OCS Course Management Plan dated 1 May 2011

2. The XX Battalion (OCS) Proponent Certification Board has reviewed the instructor qualification records and performance of the following instructor and has certified him/her to instruct in the OCS program:

Rank/Name \_\_\_\_\_

Unit: \_\_\_\_\_

Effective Date of Certification \_\_\_\_\_

3. POC this action is at DSN 123-4567, commercial (123) 456-4567 or via email at smith@us.army.mil.

ROBERT B. SMITH  
LTC, IN, ARNG  
Commanding

## PLATOON TRAINER EVALUATION FORM

PLATOON TRAINER EVALUATED: \_\_\_\_\_

STATE: \_\_\_\_\_

EVALUATION PERIOD: \_\_\_\_\_

**OBSERVATION SCENARIO:**OC MISSION:PLATOON TRAINER FOCUS:**PLATOON TRAINER OBSERVATION**

SCORE: 0 = Not Observed, 1 = Excellent, 2 = Satisfactory, 3 = Needs Improvement, 4 = Unsatisfactory

		Score	Comments (required for all observed areas)
1	PLATOON TRAINER is <b>consistent</b> in standards		
2	Environment is <b>stressful</b> (but not abusive).		
3	Environment is <b>demanding</b> – no free time		
4	PLATOON TRAINER is <b>Professional</b> and maintains <b>Military Bearing</b> at all times (no profanity, etc.)		
5	All tasks and corrective training have a <b>clear learning point</b>		
6	PLATOON TRAINER <b>does not require the impossible</b> from the candidate		
7	PLATOON TRAINER maintains a <b>climate of discipline</b> appropriate for Basic Status candidates		
8	Candidate <b>In-Brief</b> clearly states critical events and expectations, PLATOON TRAINER answers any questions and gives the Candidate a blank Self-Assessment Report		
9	<b>Leadership Observation Reports</b> are complete and clearly state the observed behavior and corrective action to be taken		
10	<b>Leadership Evaluation Report</b> is consistent with LORs and the candidate rating can be supported by observed behavior		
11	Candidate <b>out-brief and LER counseling</b> uses counseling methods appropriate to Basic Status candidates and provides a constructive plan for improvement		
Total Score			
Total Number of Areas Observed			
Average Score of Areas Observed			

\_\_\_\_\_  
(SIGNATURE)\_\_\_\_\_  
(SIGNATURE)\_\_\_\_\_  
(PRINTED NAME)\_\_\_\_\_  
(PRINTED NAME)

RATED PLATOON TRAINER OFFICER/NCO

EVALUATOR



# Part I

## COURSE SUMMARY SECTION

- ☐ OCS Student Enrollment Checklist (Annex F)
- ☐ Emergency Contact Information sheet
- ☐ OCS Application / Enrollment Form (local form or ATRRS print out)
- ☐ Letter of Recommendation
- ☐ Social Security Card (Copy)
- ☐ ETS date (Must be after graduation date) (Copy of PQR or Extension Contract DA Form 4836)
- ☐ TDY / Travel Orders

## OCS Prerequisites

- ☐ Attachment Orders
- ☐ Promotion Orders- to E-6 (if applicable)
- ☐ Birth Certificate (Copy)
  - ☐ Age (Not to exceed 41 years and 364 days at commission)
- ☐ Proof of U.S. Citizenship – Required if not born in US
- ☐ Name Change Documents (if applicable)
- ☐ Chapter II Commission Physical (DD 2808/2807-1) (Must be within 24 months of commissioning) / PHA Periodic Health Assessment
  - ☐ Medical NGB Waiver Request / Approval (if required)
  - ☐ TAG (90 day waiver if no physical in file) (**Traditional only**)
- ☐ (PHA) Required if Chapter II physical is more than one year old
- ☐ Official College Transcript :
  - Traditional:** Minimum 60 Semester hours / 90 quarter hours
  - AOCS:** 90 Semester hours + 4 Year Degree Producing Plan
- ☐ Proof of GT Score / Minimum 110 (DA Form 2-1)
- ☐ DD Form 214/ DD Form 220/NGB 22/ Military Training (AIT/1 year service waiver)
- ☐ OCS State Enlistment option copy (if applicable DD Form 1966)
- ☐ Security Clearance – Security Verification Letter / E-QIP / Joint Personnel Adjudication System (JPAS)
- ☐ Moral/Civil Conviction Waiver Approval
- ☐ Request for any Other Waivers (if applicable), with Developmental Counseling Statement to support that student is aware of waiver process.
- ☐ NGB 62 - Draft

# Part II

## GENERAL INFORMATION

- ☐ Candidate Profile Summary
  - ☐ OC Photo
  - ☐ OC Autobiography
- ☐ Academic Section
  - ☐ Developmental Counseling Forms -for academic deficiency of exam failure.
  - ☐ Academic Class Standings
  - ☐ Score Sheets (WTBD Phase I)
  - ☐ All writing assignments, book reports, class assignments, essays
- ☐ Disciplinary Section
  - ☐ Class Action Memorandums
  - ☐ Board Action Results
  - ☐ Developmental Counseling Forms –Documenting Relief, Recycle, or Removal
  - ☐ Relief, Recycle, Removal, or Retention Documents – to include notification to student in writing of recommendation for relief and the reason(s), IAW TRADOC REG 351-18.
  - ☐ Notification of Relief (DD Form 785) - Record of disenrollment from a Phase of OCS Training).
  - ☐ Letter to 1st General Officer in OC's chain of command from the OCS Battalion Commander.
  - ☐ Appeal Notification to Student
- ☐ Miscellaneous (as needed)
  - ☐ Phase Completion Certificates (local forms – if applicable)
  - ☐ Other Documents
  - ☐ \*NO EXAM SCORE SHEETS!

# Part III

## COMMAND RATING

- ☐ End of Course Summary (Filed *On Top Of* This Page)  
(Form in Annex F of CMP)
- ☐ Summary of Candidate's Performance
- ☐ LAP Documentation
  - ☐ Chronological Order with most recent on top
  - ☐ Complete LER Packet consist of
    - ☐ LER In-Brief (Light Blue Card)
    - ☐ Officer Candidate Self-Assessment (Yellow Card)
    - ☐ All LORs (SPOT Reports) for the period (Green Card)
    - ☐ Completed LER (white bond)
  - ☐ FLER (used for LRC/FLX's, in-brief, self assessment  
LOR & LER not needed with the FLER documentation)

# Part IV

## CHRONOLOGICAL REPORTS OF COUNSELING

- ☐ Counseling Checklist
- ☐ All documented Counseling (other than LAP Counseling)
- ☐ Examples of Required Counseling on DA Form 4856 or specific memorandum found in Annex F
  - ☐ Prerequisite / Inprocessing Counseling (NLT Day 1, Phase 1)
  - ☐ Initial Counseling (NLT 72 hours, Phase 1)
  - ☐ End of Phase Counseling, Phase II
  - ☐ Poor Performance
  - ☐ Missing Documentation (see below examples)
    - ☐ Commissioning Physical
    - ☐ Medical Waiver
    - ☐ Security Clearance
    - ☐ College Credit Requirements
    - ☐ Citizenship Waiver
    - ☐ AIT/ 1 year Service Waiver

# Part V

## PEER EVALUATIONS

- ☐ Peer Evaluation Leadership Assessment Forms
- ☐ Analysis of Individual Candidate Peer Evaluations
- ☐ Peer Evaluations (DA Form 4856)

# Part VI

## PHYSICAL ABILITY SECTION

- ☐ DA Form 705 APFT Scorecard
- ☐ DA Form 5500 / 5501-R Body Fat Computation Worksheet (attach General Counseling form for not meeting standards IAW AR 600-9)
- ☐ Sick Slips (if needed)
- ☐ Temporary Profiles (if needed)
- ☐ Semi-Annual Weigh-In Documentation (as required)
- ☐ DA Form 4856 Counseling – monthly for candidates enrolled in the Army Weight Control Program

<b>DEVELOPMENTAL COUNSELING FORM</b> <small>For use of this form, see FM 6-22; the proponent agency is TRADOC.</small>		
<b>DATA REQUIRED BY THE PRIVACY ACT OF 1974</b>		
<b>AUTHORITY:</b>	5 USC 301, Departmental Regulations; 10 USC 3013, Secretary of the Army.	
<b>PRINCIPAL PURPOSE:</b>	To assist leaders in conducting and recording counseling data pertaining to subordinates.	
<b>ROUTINE USES:</b>	The DoD Blanket Routine Uses set forth at the beginning of the Army's compilation of systems or records notices also apply to this system.	
<b>DISCLOSURE:</b>	Disclosure is voluntary.	
<b>PART I - ADMINISTRATIVE DATA</b>		
Name (Last, First, MI)	Rank/Grade OC	Date of Counseling
Organization	Name and Title of Counselor	
<b>PART II - BACKGROUND INFORMATION</b>		
<b>Purpose of Counseling:</b> (Leader states the reason for the counseling, e.g. Performance/Professional or Event-Oriented counseling, and includes the leader's facts and observations prior to the counseling.)  The purpose of this End of Phase Counseling is to inform the candidate of his/her performance within the current class based on their performance in leadership, academics, peer evaluations and physical fitness.		
<b>PART III - SUMMARY OF COUNSELING</b> Complete this section during or immediately subsequent to counseling.		
<b>Key Points of Discussion:</b>  OC_____ received the following ratings in leadership evaluations.  <div style="display: flex; justify-content: space-around; margin: 10px 0;"> <span>PHASE I</span> <span>PHASE II</span> </div> OC_____ has an academic average of _____ %  OC_____ received the following rankings:  <div style="display: flex; justify-content: space-around; margin: 10px 0;"> <div style="text-align: center;">             PHASE I              ____ of ____           </div> <div style="text-align: center;">             PHASE II              #1 ____ of ____              #2 ____ of ____           </div> </div> OC_____ has an APFT average of _____ points.		
<b>OTHER INSTRUCTIONS</b> This form will be destroyed upon: reassignment (other than rehabilitative transfers), separation at ETS, or upon retirement. For separation requirements and notification of loss of benefits/consequences see local directives and AR 635-200.		

**Plan of Action** (Outlines actions that the subordinate will do after the counseling session to reach the agreed upon goal(s). The actions must be specific enough to modify or maintain the subordinate's behavior and include a specified time line for implementation and assessment (Part IV below))

OC \_\_\_\_\_ must continue to perform at an acceptable level in order to graduate OCS.

OC \_\_\_\_\_ must complete all phase III requirements and be recommended for graduation by the company commander in order to complete OCS.

**Session Closing:** (The leader summarizes the key points of the session and checks if the subordinate understands the plan of action. The subordinate agrees/disagrees and provides remarks if appropriate.)

Individual counseled: ☐ I agree ☐ disagree with the information above.

Individual counseled remarks:

Signature of Individual Counseled: \_\_\_\_\_ Date: \_\_\_\_\_

**Leader Responsibilities:** (Leader's responsibilities in implementing the plan of action.)

Signature of Counselor: \_\_\_\_\_ Date: \_\_\_\_\_

#### PART IV - ASSESSMENT OF THE PLAN OF ACTION

**Assessment** (Did the plan of action achieve the desired results? This section is completed by both the leader and the individual counseled and provides useful information for follow-up counseling.)

Counselor: \_\_\_\_\_ Individual Counseled: \_\_\_\_\_ Date of Assessment: \_\_\_\_\_

**Note:** Both the counselor and the individual counseled should retain a record of the counseling.



**RESERVE COMPONENT OFFICER CANDIDATE SCHOOL END OF COURSE SUMMARY**  
 READ PRIVACY ACT STATEMENT ON REVERSE BEFORE COMPLETING THIS FORM

PART I - ADMINISTRATIVE DATA							
LAST NAME		FIRST NAME		MI	CLASS NUMBER		ORGANIZATION
SSN		DATE ENROLLED		STUDENT NUMBER		STATE	
PART II - PEER RATING / ACADEMIC AVERAGE							
1st PEER RATING		2nd PEER RATING		3rd PEER RATING		ACADEMIC AVERAGE	
PART III - LEADERSHIP POSITIONS HELD (LIST EACH POSITION AND PERFORMANCE RATING ATTAINED)							
POSITION	DATE	PHASE	RATING	POSITION	DATE	PHASE	RATING
PART IV - ACADEMIC PERFORMANCE (PERCENTAGES)							
PHASE I			PHASE II				
EVENT	TEST %	RETEST %	EVENT	TEST %	RETEST %		
LAND NAV (WRITTEN)			SUPPLY ACTIVITIES				
LAND NAV (DAY)			ELEMENTS OF MILITARY INTEL				
LAND NAV (NIGHT)			CALL FOR FIRE				
LAND NAV (OVERALL)			LEADERSHIP				
ARMY TRAINING MANAGEMENT			MILITARY JUSTICE				
			HERITAGE AND HISTORY				
			TACTICS				
			OPERATIONS				
WTBD COMPLETION DATE			3 MILE FORMATION RUN COMPLETION DATE				
5 MILE FOOT MARCH COMPLETION DATE			7 MILE FOOT MARCH COMPLETION DATE				
			10 MILE FOOT MARCH COMPLETION DATE				
COMPANY COMMANDER SIGNATURE			APFT SCORE:		DATE COMPLETED:		
			COMPANY COMMANDER SIGNATURE				
DATE COMPLETED PHASE I		CO CDR PRINTED NAME		DATE COMPLETED PHASE II		CO CDR PRINTED NAME	
PHASE I COMMENTS				PHASE II COMMENTS			
PHASE III							
EVENT	DATE COMPLETED		EVENT	DATE COMPLETED			
OBSTACLE/CONFIDENCE COURSE			COMBAT WATER SURVIVAL TEST				
LEADERSHIP REACTION COURSE							
PHASE III COMMENTS							
COMPANY COMMANDER SIGNATURE				CO CDR PRINTED NAME		DATE COMPLETED PHASE III	
OVERALL COMMENTS							
PART V - FINAL DISPOSITION							
<input type="checkbox"/> INDIVIDUAL GRADUATED _____ (DATE)				<input type="checkbox"/> INDIVIDUAL WAS DISENROLLED _____ (DATE) FOR			
<input type="checkbox"/> INDIVIDUAL TRANSFERRED _____ (DATE)				REASONS INDICATED			
PART VI - AUTHENTICATION							
REVIEWED BY	NAME (LAST, FIRST, MI), RANK, AND TITLE			SIGNATURE		DATE	
APPROVED BY							

## DATA REQUIRED BY THE PRIVACY ACT OF 1974

1. AUTHORITY: See Executive Order 93.97.
2. PURPOSE: The End of Course Summary provides an in depth summary of the soldier's performance while enrolled in the Officer Candidate School. It serves the same purpose as a Service School Academic Evaluation Report.
3. ROUTINE USE INSTRUCTIONS:
  - a. The End of Course Summary is maintained by the OCS Company cadre while the soldier is enrolled in OCS.
  - b. The End of Course Summary Company Commander signature block for each Phase will be signed by the Company Commander of that phase.
  - c. Overall Comments Block and Part V Final disposition will be filled out as follows:
    - (1). Traditional Program Students: Will be completed by Home State OCS Company cadre
    - (2). Accelerated One Stop Shop(AL/SD) Program Students: Will be completed by ADT Site as determined ADT Site Commander.
  - d. Part VI Authentication:
    - (1) Traditional Program Students:
      - (a). The Reviewed by blocks will be completed by the Home State OCS Company Commander
      - (b). The Approved by blocks will be completed by the Homes State Bn Commander
    - (2). Accelerated One stop Shop(AL/SD) Program Students:
      - (a). The Reviewed by blocks will be completes as determined by site Commander, preferably the Company Commander, QA or S-3.
      - (b). The Approved by blocks will be completed by the Site Bn Commander.
  - e. The original is kept on file with the soldier's official military record and a copy is provided to the soldier.
4. DISCLOSURE: Disclosure of the soldier's SSN is voluntary. However, failure to verify the SSN may result in a delayed or erroneous processing of the End of Course Summary.

**OCS Platoon Trainer / Instructor Qualification / Certification requirements:**

All assigned, attached and guest Platoon Trainers / Instructors must meet qualification and certification requirements listed below: All certification documentation must be in the Platoon Trainer / Instructor packet in the following order (from top to bottom).

**DOCUMENTATION:****GO / NO-GO**

- |  |                |
|--|----------------|
| a. Current DA Form 705 and if necessary (exceeding table weight and requiring tape) DA Form 5500-R (male) or DA Form 5501-R (female).  | _____          |
| b. Copies of all Platoon Trainer / Instructor evaluations from previous 12 months (semi-annual).   |                |
| c. Promotion orders, PQR or certified 2-1 showing appropriate rank of:<br>1LT (O-2), SFC (E-7), CW2, or above (Platoon Trainers). 1LT (O-2), SSG (E6), CW2 or above (Instructors). | _____<br>_____ |
| d. Battalion Certification memorandum with all required documentation IAW OCS CMP para 3-1 (4).  |                |
| e. DA Form 1059 from Army Basic Instructor Course (ABIC), Total Army Instructor Training Course (TAITC) or Battle Focused Instructor Training Course (BFITC).                      | _____          |
| f. Orders awarding Additional Skill Identifier (ASI) of 8 (enlisted cadre/warrant officer cadre) or identifier 5K (commissioned officer cadre).                                    | _____          |
| g. DA Form 1059 from Platoon Trainer Qualification Course (PTQC), TAC Qualification Course (TQC) or TAC Officer Training and Orientation Course (TTOC).                            | _____          |
| h. DA Form 1059 from Tactical Certification Course (TCC). (Per OCS CMP)  |                |
| i. DA Form 1059 from Basic Officer Leadership Course (BOLC B) / Advanced Leaders Course (ALC) /Advanced Non-Commissioned Officer Course (ANCOC).                                   | _____          |
| j. Composite Risk Management (CRM) Training Certificate.   | _____          |
| k. Proof of COE training (Class roster, Certificate)   | _____          |

REPLY TO  
ATTENTION OF

STATE ARMY NATIONAL GUARD  
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DATE

## MEMORANDUM FOR RECORD

SUBJECT: ARNG OCS Student Evaluation Plan (SEP)

1. Purpose. This document serves as the Student Evaluation Plan (SEP) as required by TR 350-70 Chapter VI Section 7-5 para a. All information is extracted from the current ARNG OCS Course Management Plan (CMP).

2. Requirements. The Accreditation Standards Guide requires the SEP be explained to students as part of initial counseling/inprocessing. TRADOC 350-70 and TRADOC PAM 350-70-5 requires the SEP be provided in writing and explains evaluation methods, exams, retesting policy and graduation requirements. **The SEP should be posted in common areas for the students to review.**

3. Testing. Each testable module will follow the train, review and test methodology. Students failing an exam will be counseled in writing on a DA 4856, retrained and retested. Candidates must pass all written examinations or retests with a score of 70% or higher. Only one retest will be given per test except under special circumstances. Exceptions to the retest policy must be recommended by the Company Commander and approved by the Battalion Commander. **A second retest is given only under exceptional circumstances.** The OC who passes the retest is awarded a minimum score of 70% regardless of actual score they receive; both scores are annotated on the End of Course Summary.

a. Any candidate that fails a cumulative of 3 written examinations will automatically be placed on ACADEMIC PROBATION. The Candidate will be counseled on a DA 4856 explaining the consequences of continued academic failure. A fourth failure will result in a recommendation to the Battalion Commander for possible relief from the course.

b. Candidates who miss or cannot actively participate in 12 or more hours of scheduled training may be recommended for recycle. Only the Battalion Commander can make exceptions to this policy.

4. Leadership Position Evaluations. Each student will receive and complete a minimum of one leadership position evaluation during Phase I and Phase II. Phase III candidate's will receive an evaluation during the LRC and FLX II operations. Leadership evaluation and counseling in OCS measures observed performance, not potential. Assessment is purposely subjective using Actions, Skills and Attributes and an E-S-N scale. Prior to attending Phase III consolidated training, the OCS

**SUBJECT: ARNG OCS Student Evaluation Plan (SEP)**

Company Commander must consider each candidate to possess the potential to acquire the leadership skills, attitudes, and knowledge needed to become a successful newly commissioned Second Lieutenant. Candidates not considered by the OCS Company Commander to possess this potential are counseled in writing and recycled or relieved from the OCS program.

5. **Counseling.** Keen observation of candidate performance and detailed, caring counseling is the cornerstone of OCS training. This training / counseling are where the candidate acquires the leadership skills and attitudes that enable him / her to become a successful officer. The Platoon Trainer uses the counseling tools provided in the OCS Platoon Trainer Guide and counsels candidates IAW the OCS Leadership Assessment Program (LAP) provided in Chapter 9 of the CMP and the OCS Platoon Trainer guide. It is imperative that Platoon Trainer and NCOs skillfully use the LAP tools and counseling process to impart leadership skills and knowledge on the officer candidates.

6. **Phase I.** The following training events and tests must be successfully completed prior to the end of Phase I to be a graduate of this phase.

a. **Examinations.** Must pass all four Phase I exams or retests. Candidate must score 70% or greater on each exam. Phase I exams include: Training Management, Applied Map Reading, Land Navigation Day Practical, and Land Navigation Night Practical. All exams and retest must be completed prior to the end of Phase I.

b. **Five mile foot march.** Conducted in Phase I, along a suitable, five mile route. Uniform is ACUs, boots, Kevlar helmet, LCE / LBV (with two full canteens at the start), weapon, and rucksack. Rucksack must weigh from 35-40 pounds at the beginning **and completion** of the foot march. Officer candidates must complete the five mile foot march without assistance in 1 hour and 45 minutes. Successful completion of the five mile foot march is a Phase I requirement. A five mile foot march retest must be completed by the candidate within 1 hour and 45 minutes without assistance in Phase I before the candidate is credited with completing Phase I. The failure of a five mile foot march must be annotated on a DA Form 4856 Developmental Counseling Form.

c. **Peer evaluation #1** is completed at the end of Phase I.

d. **Warrior Tasks and Battle Drills (WTBD).** Candidates must instruct at least one of the WTBDs and demonstrate task mastery through skill application of all WTBDs. Candidates must receive a "Go" on all WTBDs and have documented evidence of task mastery on each task.

e. **POI Training.** Must attend all POI training.

f. **APFT/Height/Weight.** All students will take and pass an APFT 60 days prior to the start of Phase I, per the CMP chapter 12. All students will meet and maintain height and weight standards IAW AR 600-9.

SUBJECT: ARNG OCS Student Evaluation Plan (SEP)

g. Leadership Evaluations Report. Must receive and complete a minimum of one leadership position evaluation during Phase I. See Chapter 9 of this CMP for details concerning the Leadership Assessment Program.

**7. Phase II.** The following training events and tests must be successfully completed prior to the end of Phase II to be a graduate of this phase.

a. Examinations. Must pass all eight Phase II exams or retests. Candidate must score 70% or greater on each exam. Phase II exams include: Operations, Tactics, Call for Fire, Leadership, Military Justice, Heritage and History, Supply Activities and Elements of Military Intelligence. All exams and retest must be completed prior to the end of Phase II.

b. Seven-mile foot march. Must complete the seven-mile foot march without assistance within 2 hours and 30 minutes. Uniform must be the same as the 5 mile foot march.

c. Ten-mile foot march. Must complete the ten-mile foot march without assistance within 3 hours and 30 minutes. Uniform must be the same as the 5 mile foot march.

d. Peer evaluation # 2 and # 3 – Peer evaluation # 2 is completed in the middle of phase II and peer evaluation # 3 is completed at the end of phase II.

e. APFT. Traditional candidate must pass standard APFT IAW TC 3-22.20 within 60 days of Phase III start date. For Accelerated course, APFT must be completed within 20 days of Phase III start date.

f. Three Mile Release Run. Must complete a three mile release run without assistance and in the designated time standard. MALE time standard is 27:00 (or 9:00 per mile). FEMALE time standard is 29:15 (or 9:45 per mile). A candidate who fails to meet the standard will be given one retest. Uniform will be the IPFU.

g. Program of Instruction (POI) Training. Must attend all Phase II POI training.

h. Leadership Evaluations Report. All students must have a minimum of one Garrison leadership position during Phase II and be counseled using the Leadership Evaluation Report (LER). Candidate must receive an “E” or an “S” to graduate Phase II.

**8. Phase III.** The following training events must be successfully completed prior to the end of Phase III to be a graduate of this phase and the OCS course.

a. Combat Water Survival Test. Candidates will attempt each event of the CWST, consisting of the 15-meter swim; three meter drop and equipment removal in order to determine whether a Candidate is a weak or strong swimmer. Failure to attempt any CWST event will result in recycle or elimination from the course.

**SUBJECT: ARNG OCS Student Evaluation Plan (SEP)**

b. Obstacle Course. Candidates must attempt each obstacle in order to graduate. The Company Commander may close some obstacles based on climatic or safety conditions. Failure to attempt each obstacle will result in recycle or elimination from the course.

c. Leadership Reaction Course (LRC). Candidate must participate as a squad member and as a squad leader at LRC training. Candidate will receive an evaluation IAW the Leadership Reaction Course Report (LRCR).

d. Field Leadership Exercise (FLX II). Candidate will be evaluated during FLX II. They must receive an "E" or an "S" on a Field Leadership Evaluation Report (FLER) in order to graduate Phase III.

e. POI Training. Must attend all Phase III POI training as outlined in Annex D of the CMP.

f. Must be recommended by the OCS Company Commander (by signature on End of Course Summary Sheet Phase III) as possessing the leadership skills, attitudes and knowledge required of a newly commissioned Second Lieutenant prior to graduating Phase III and OCS.

9. Academic Evaluation Report (AER). The ARNG End of Course Summary is used to track the completion of all test scores and training events in all phases of OCS.

10. Relief and Recycle from the OCS Course.

a. Non-academic. See attached diagram for Non-academic relief and recycle. This includes Leadership, motivational and disciplinary relief from the current phase of training and /or the OCS Course.

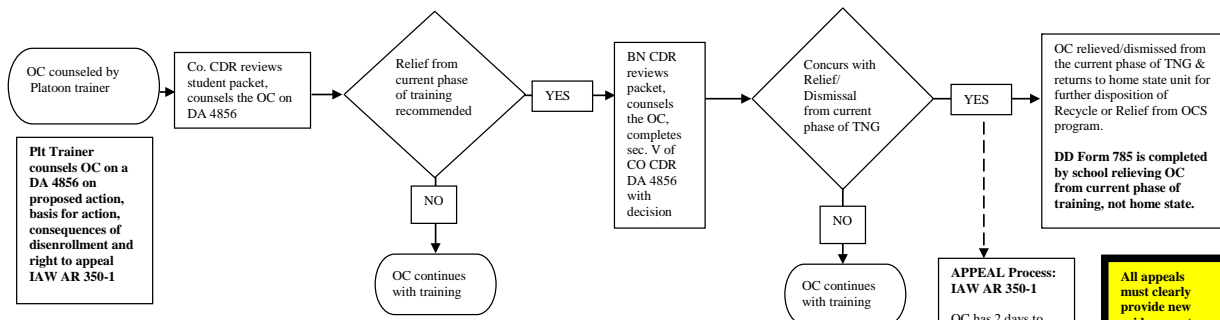
b. Academic relief. See attached diagram for academic relief and recycle. Academic relief and recycle are conducted when a candidate fails an exam and retest with a score below 70% or after the 4<sup>th</sup> test failure.

c. Appeal process. See attached diagram.

11. Any questions regarding this Student Evaluation Plan should be addressed through the chain of command.

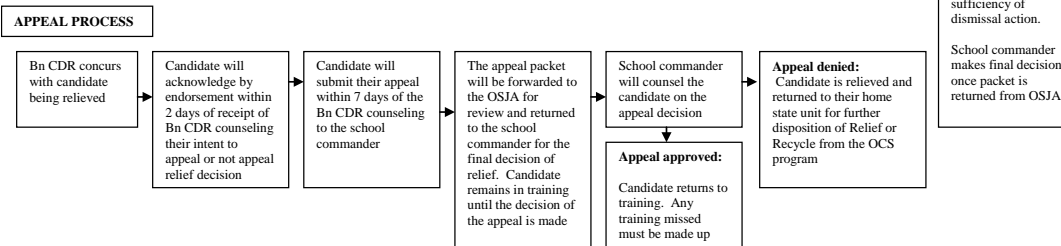
Encl  
Relief and Recycle Diagram

//////////SIGNED//////////  
FIRST NAME, MI, LAST NAME  
RANK, BRANCH, ST ARNG  
Commanding

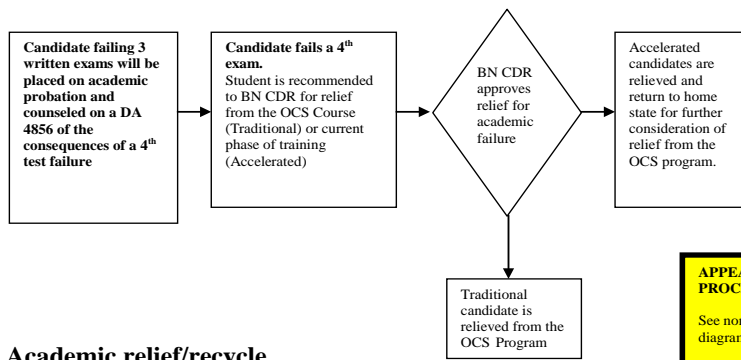
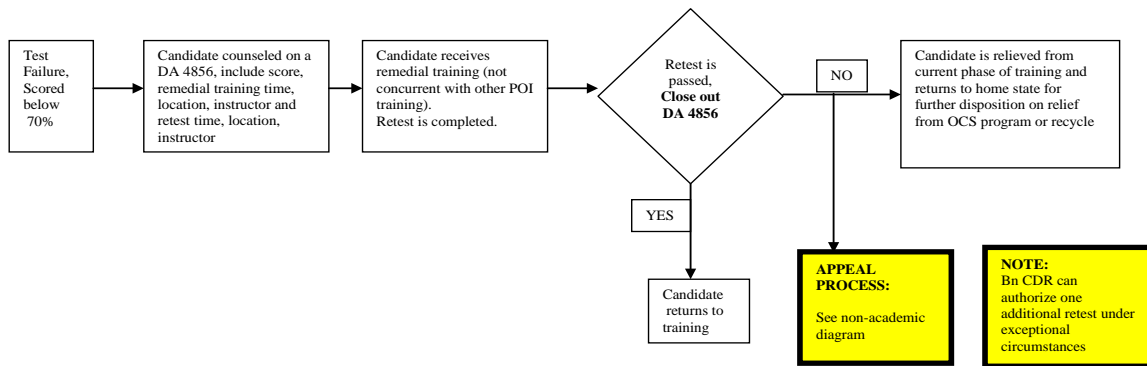


Relief/Dismissal or Recycle process  
for motivational, disciplinary, or leadership

#### Non-Academic







**Academic relief/recycle**

